SECOND EDITION

Nonprofit Trends Report

Trends, Challenges, and Opportunities with Technology

Foreword

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Nonprofits operate in an increasingly volatile world – and a rapidly evolving digital landscape. These factors create both challenges to their missions and opportunities for their vision. Demand for more nonprofit programs and services is rising, as the world is threatened by climate change, natural and human-made disasters, humanitarian crises, political chaos, food insecurity, and so much more.

However, meeting the swell in demand has left many nonprofits fighting for resources and struggling to connect with people and their purpose. This is coupled with survey results that clearly show an increase in public interest in causes. We surveyed 725 nonprofit professionals, of which 420 are in Europe and 305 are in North America. This is a historic moment in time for nonprofits to engage with inspired individuals. At the same time, nonprofits of all sizes are facing growing expectations to be digital in their mindset – to meet the demands of constituents who are used to personalized and real-time experiences in the rest of their lives.

To create such experiences, nonprofits rely on data to understand their supporters – down to a personal level – and communicate relevant, targeted and curated content, opportunities and outcomes. Nonprofits also use this data to measure and prove progress against their goals, and to nimbly take action to recalibrate priorities when they need to. Nonprofits that can capture data, and distill it into actionable insights, have several advantages in creating lasting connections with their stakeholders while delivering their services at scale.

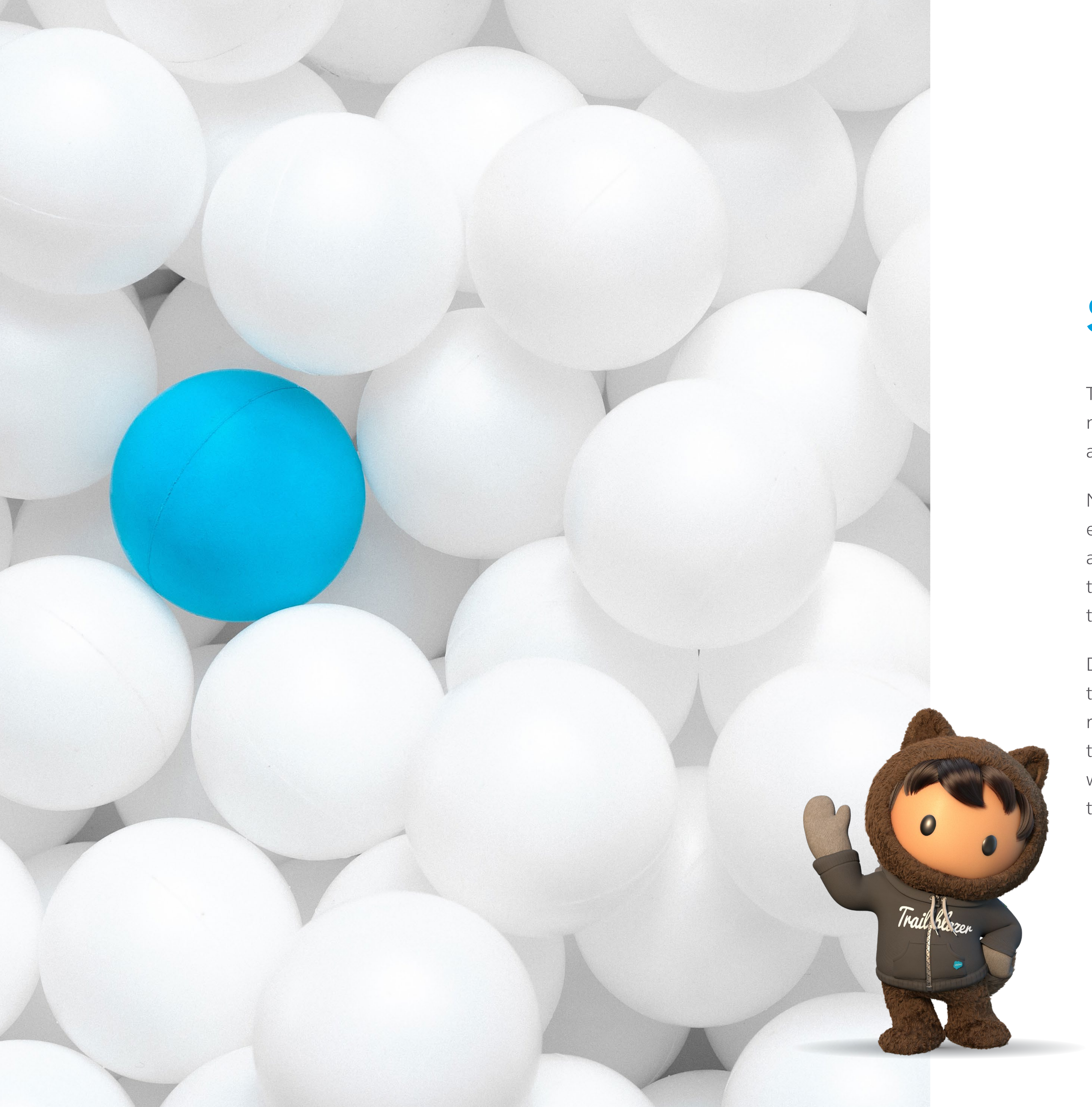
Technology is the great equalizer and can unlock the power of data while providing personalized experiences. It allows nonprofits to reach new audiences, serve more communities, respond to new challenges, or optimize opportunities. Innovative technologies create many new scenarios to operate smarter and increase efficiency. To do this, nonprofits must embrace new tools to become the social change platform their constituents are demanding. When digital transformation is set aside, a nonprofit is more susceptible to disruption from other nonprofits that modernize. The consequences of nonprofit erosion are even worse, because nothing replaces their impact on society. This leaves a rip in our social fabric.

Even when nonprofits embrace technology, their staff may not fully leverage the technology, creating lower return on its promise. Today's most successful nonprofits are digital-first – they embed technology deep in their core strategy. Their experiences feel like they do with technology at home, frictionless – and empowering.

We hope this year's Nonprofit Trends Report helps organizations better leverage technology to support their mission today, and anticipate the needs of tomorrow. We believe technology for nonprofits should be affordable, break down silos, enable global scale, provide flexibility in building custom solutions, and make it possible for organizations to capture, share, transfer, and access data when needed.

This approach will ensure technology truly drives impact where nonprofits become the open platform that connects people to social change. Let's make the next decade the decade of measured, scaled, connected, and ultimately, sustainable impact.

THANK YOU FOR LEADING US IN IMPACT.



Summary of Findings

This study continues the conversation started last year, with an annual report on how nonprofits are being asked to play a larger role in serving communities around the world, and how technology can accelerate their ability to do so.

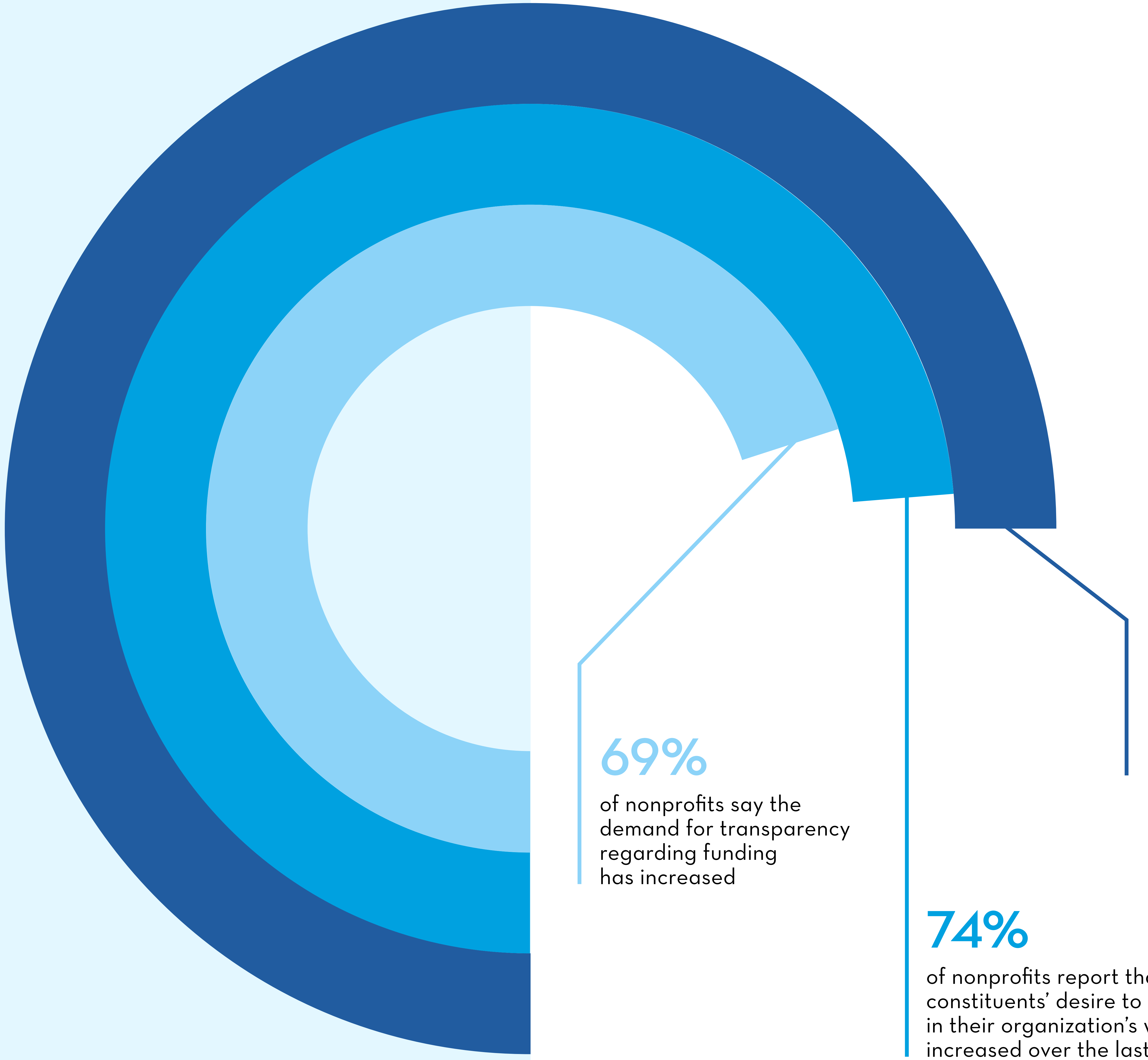
Nonprofit leaders indicated they are looking to develop innovative and effective ways to expand programs, acquire new donors, create more relevant constituent experiences, and engage community partners. Adjusting program and fundraising strategies to meet these goals requires digital connections across departments, ways to work smarter with technology, and data to infer strategy.

Data is fast becoming the lifeblood of nonprofits as they seek to understand and improve their mission's impact, along with their fundraising and marketing effectiveness. In this report, we take a closer look at the opportunities for accelerating impact with technology that will connect organizations to constituents in meaningful and personal ways, along with the challenges nonprofits face in embedding technology into processes throughout their organizations.

KEY FINDINGS

As Challenges Grow, Nonprofits Need to Grow, Too

- Transparency and trust are still the keys to success
- People want to be involved in nonprofits' work
- Demand for programs and services is rising in an increasingly volatile world



75%
of nonprofits reported an increase in demand for programs

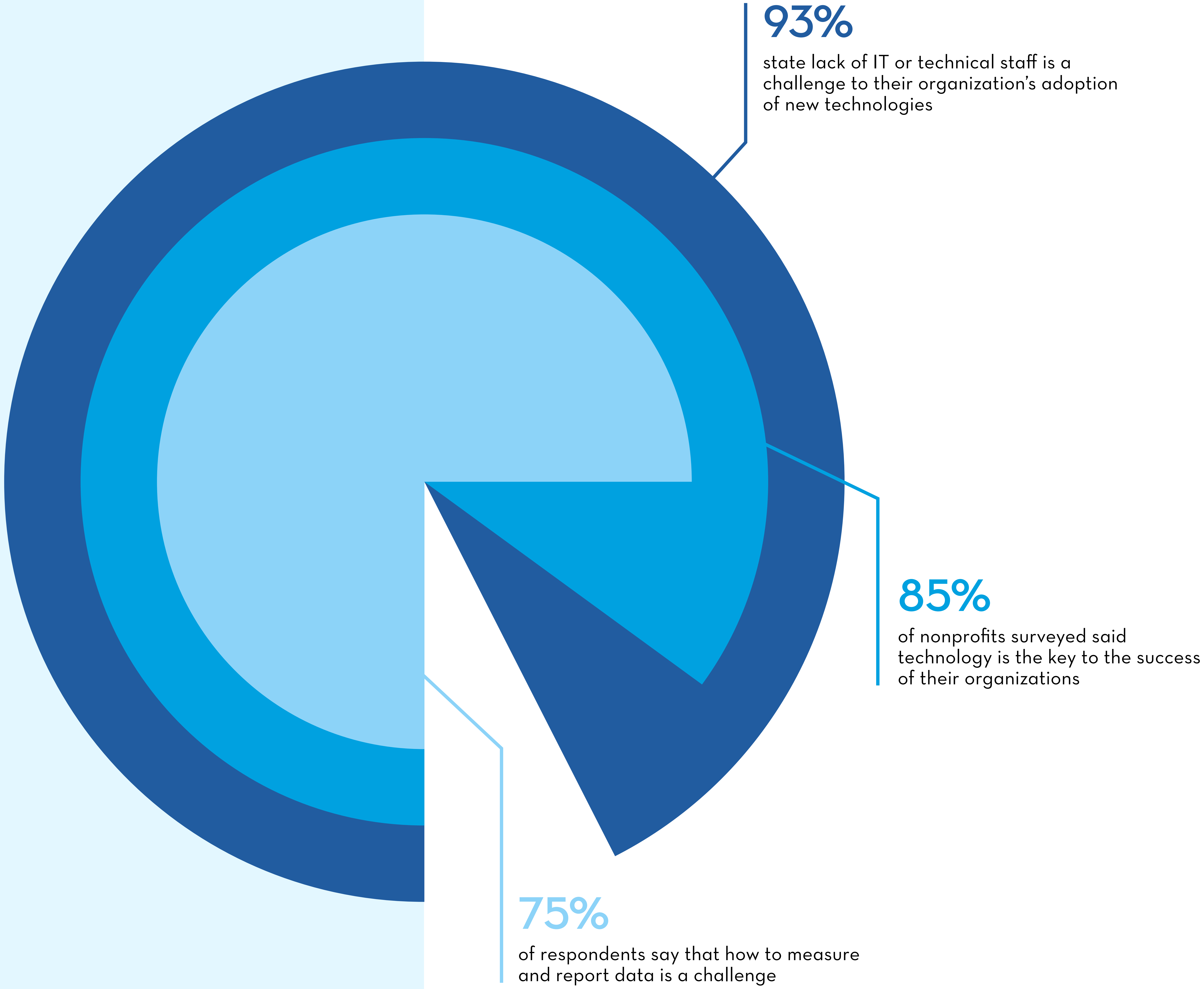
69%
of nonprofits say the demand for transparency regarding funding has increased

74%
of nonprofits report that constituents' desire to participate in their organization's work has increased over the last five years

KEY FINDINGS

Technology is Key to Success, but Challenges Remain

- Technology helps connect nonprofits and their constituents
- Nonprofits lack IT talent, vision and budget
- Capturing and leveraging data are continuous challenges for nonprofits



KEY FINDINGS

Nonprofits Are Using Technology, but Adoption and Success Vary

- The largest focus for marketing is digital outreach
- Fundraising teams have the highest adoption of basic CRM
- Program teams lag behind other departments in the adoption of technology

91%

have a core CRM or are planning to use one, yet less than one third of development teams use mobile for staff or constituent experience

85%

use insights from their marketing and engagement data to target outreach and social media, website, and advertising are the top three focus areas

85%

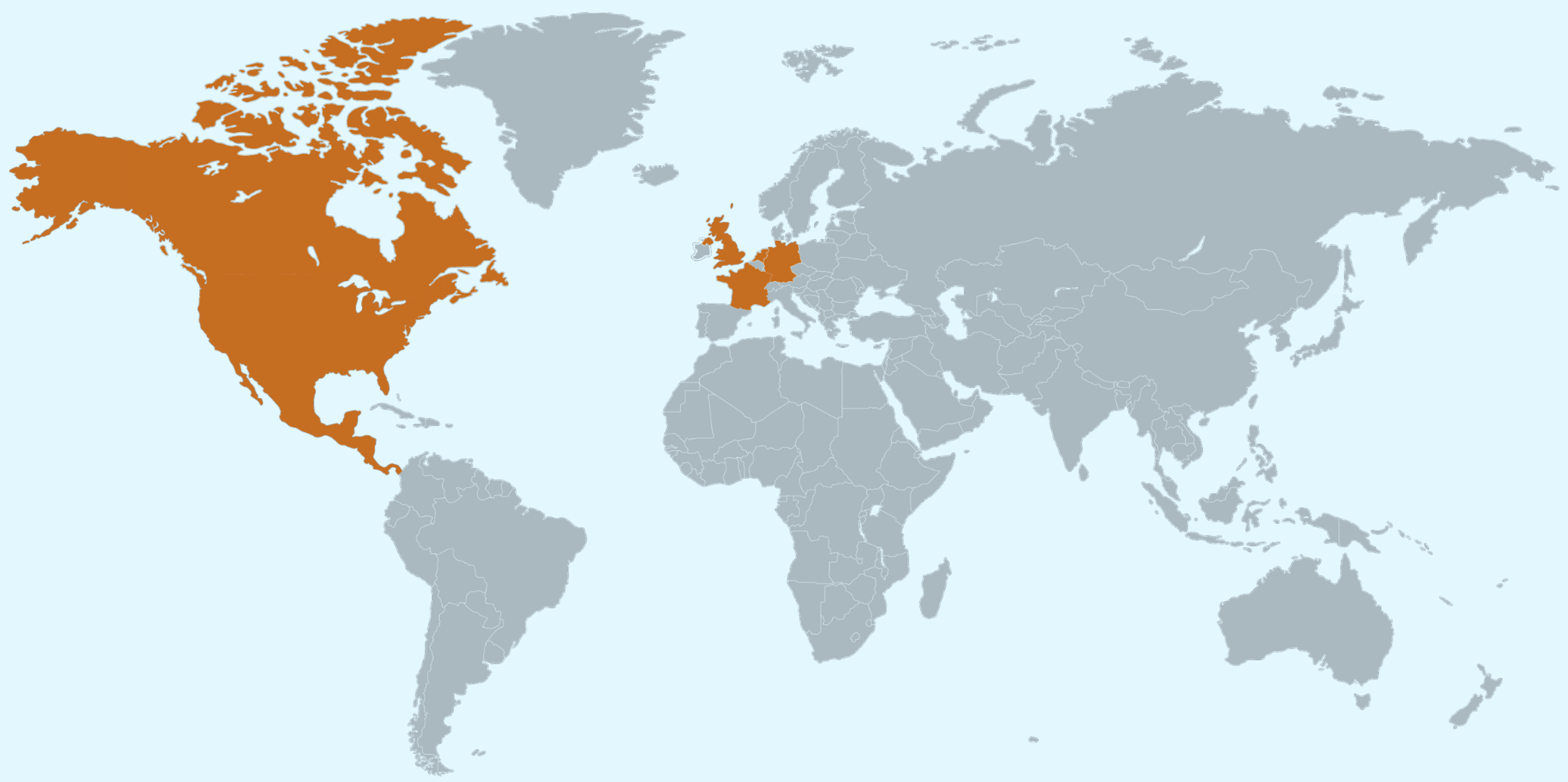
believe that technology can replace a lot of the manual tasks that take them away from delivering services

Who, Where, and How Many Nonprofits Responded

In this latest report, we surveyed nearly twice the number of nonprofit professionals from last year – 725 people in the United States, Canada, the United Kingdom, France, Germany, and the Netherlands. Organization sizes surveyed ranged from 1 employee to more than 10,000 employees. Data were collected from surveys in the field July 16-August 9, 2019. **All of the statistics cited are inherently global unless otherwise stated.** For a deeper dive into country-specific details on data or country profiles, please see the appendix at the end of this report.

2018: 450 RESPONDENTS

2019: 725 RESPONDENTS



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Section One

Creating Meaningful Constituent Experiences

Nonprofits continually strive to better understand and connect with their constituents, and now believe, more than in previous years, that people want to support their missions.

Creating Meaningful Constituent Experiences

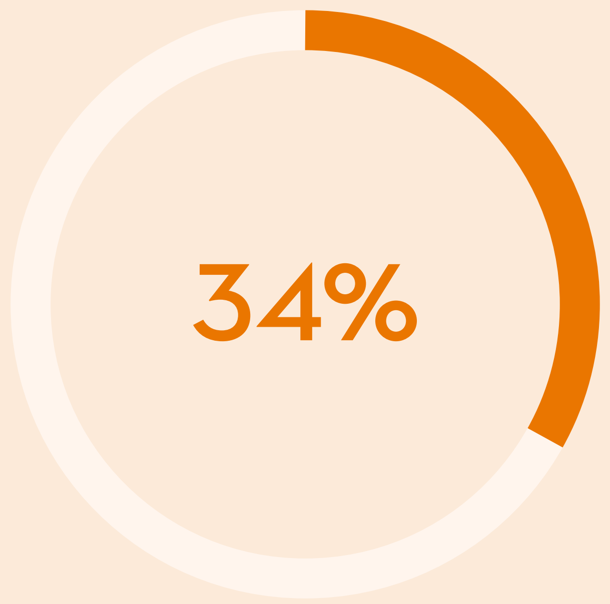
Nearly **three-quarters of nonprofits (74%) report that constituents' desire to participate in their organization's work has increased** in the last five years. When we compare just the countries that we surveyed last year in the U.S., U.K., and Canada, 75% reported an increase in desire to participate, which was an increase of **16 points from last year.** To take advantage of this opportunity, many nonprofits aim to provide more meaningful and better personalized constituent experiences – both offline, but more importantly online, in an increasingly digital world.

To deepen connections with beneficiaries, donors, clients, and partners, nonprofits require a comprehensive engagement strategy and a continuous feedback loop from the communities they serve. Currently, just over half of survey respondents say that they measure donor or client satisfaction. Of those that collect this data, **34% take no action on feedback collected.** When used consistently, this critical feedback helps align efforts to community needs or better supporter experiences.

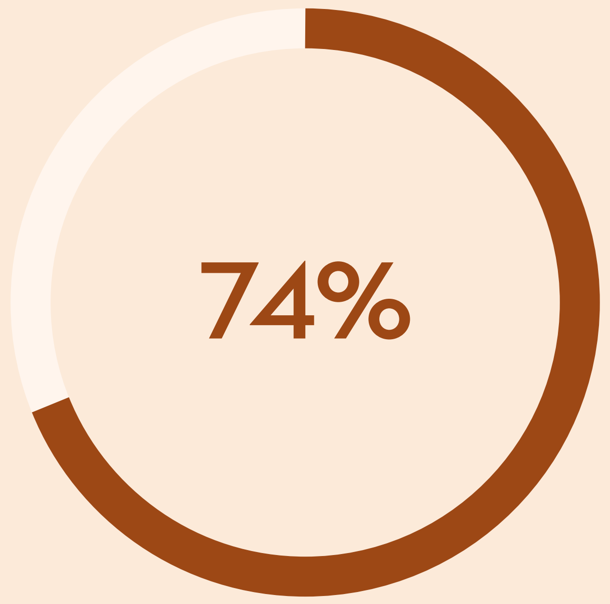
These gaps in communication and action are occurring in a dramatically shifting partnership and fundraising environment. In the last two years, **49% of global respondents are increasing partnerships with other nonprofits or for media and awareness.** Traditional partnerships with national government (16%) and local government (14%) entities are decreasing; however, this is most dramatic in the Netherlands with a 32% decrease reported in local/national government partnerships.

34% report that changes in government funding are actually affecting the organization's ability to deliver on their mission, with the Netherlands again reporting the highest effect at 42%, and Germany the lowest at 23%. This directly influences where nonprofits target their fundraising efforts, placing larger importance on individual donors, corporate partners, and institutional funders.

> **Compared to the previous year, we saw a 16 point increase in desire to participate in nonprofits' work**



report that changes in government funding are affecting the organization's ability to deliver on their mission



report that constituents' desire to participate in their organization's work has increased

Percentage of nonprofit professionals whose fundraising tactics have increased/decreased/stayed the same in the past 5 years

Traditionally Offline Fundraising Tactics	Decreased	Stayed the Same	Increased
Direct mail/direct response campaigns	-14%	35%	51%
Events	-14%	37%	50%
Corporate grants	-14%	40%	46%
Private or family foundation grants	-14%	39%	47%
Government grants	-23%	33%	44%
Major gifts (large donations)	-15%	42%	43%
Other grants	-19%	39%	41%

Typically Online Fundraising Tactics	Decreased	Stayed the Same	Increased
Social media campaigns	-7%	32%	61%
Website donation portals	-12%	29%	59%
Mobile/SMS text campaigns	-9%	33%	58%
Selling goods or services	-10%	36%	54%
Annual giving campaigns	-11%	35%	53%
Membership	-10%	39%	51%
Advertising on social platforms	-10%	39%	51%
Donor advised funds	-10%	41%	50%

Constituent Experiences & Marketing

To create awareness and effectively communicate with constituents, nonprofit marketing teams try to personalize messages to each individual and meet people on the channels where they live. **85% of respondents said they use insights from their marketing and engagement data to target outreach efforts and tailor communications.**

People's digital lives force nonprofits to operate in an ever-changing, fragmented landscape of tools. Even on one person's phone, there are countless ways to connect. Yet **only 38% who use CRM (Constituent Relationship Management) software also use marketing technology,** which provides all the tools to personalize communications at scale, across all relevant touchpoints.

Supporter Experiences & Fundraising

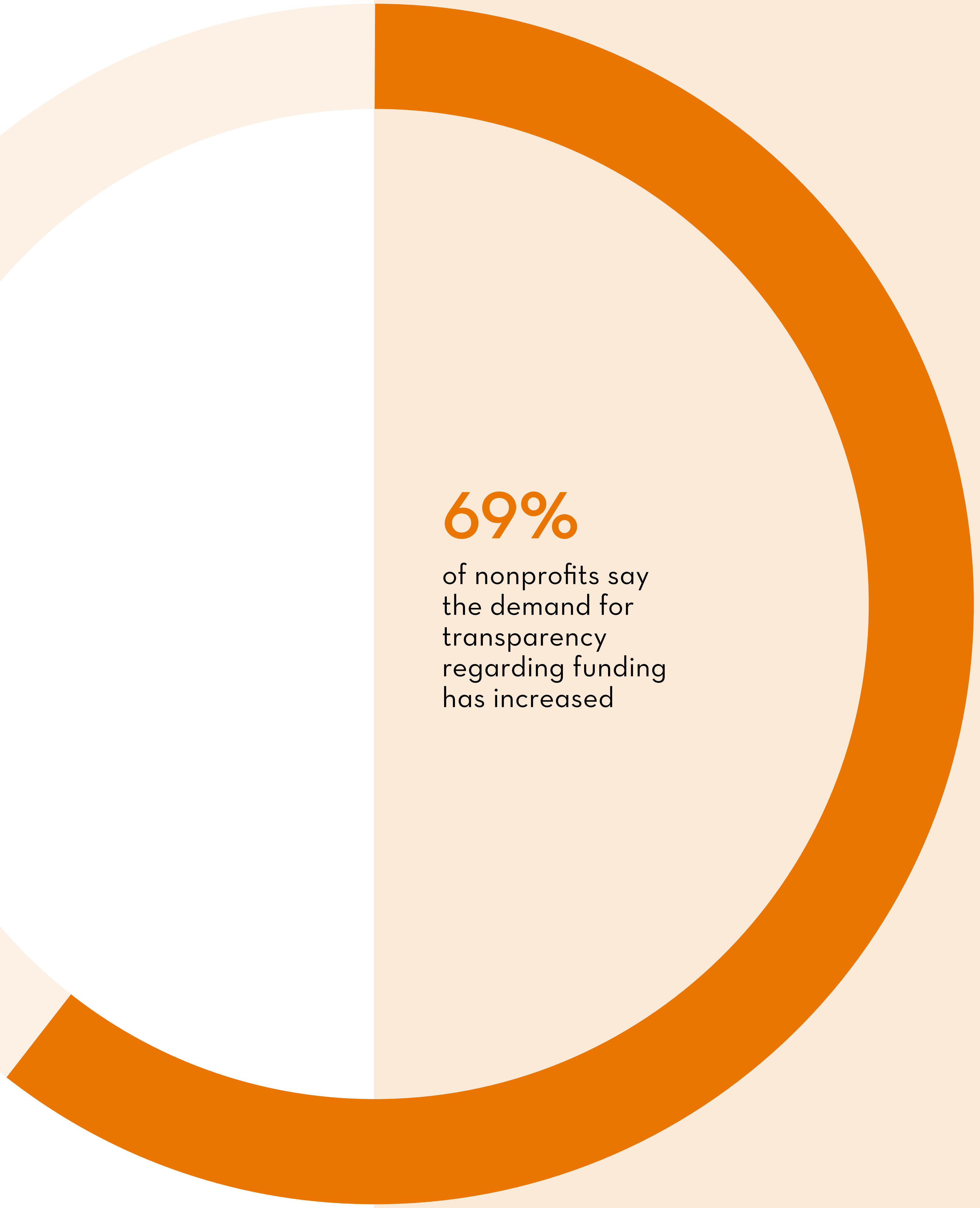
Engagement is a major driver for fundraising. Similar to the commercial world, the "consumer experience" for donors is increasingly important, as **50% of nonprofits consider competing with other nonprofits for donors** to be a "substantial" challenge. More respondents felt this in Germany at 62%, versus France at 36%. Even when they aren't competing directly for dollars, many nonprofits have issues cutting through the noise to keep the attention of supporters.

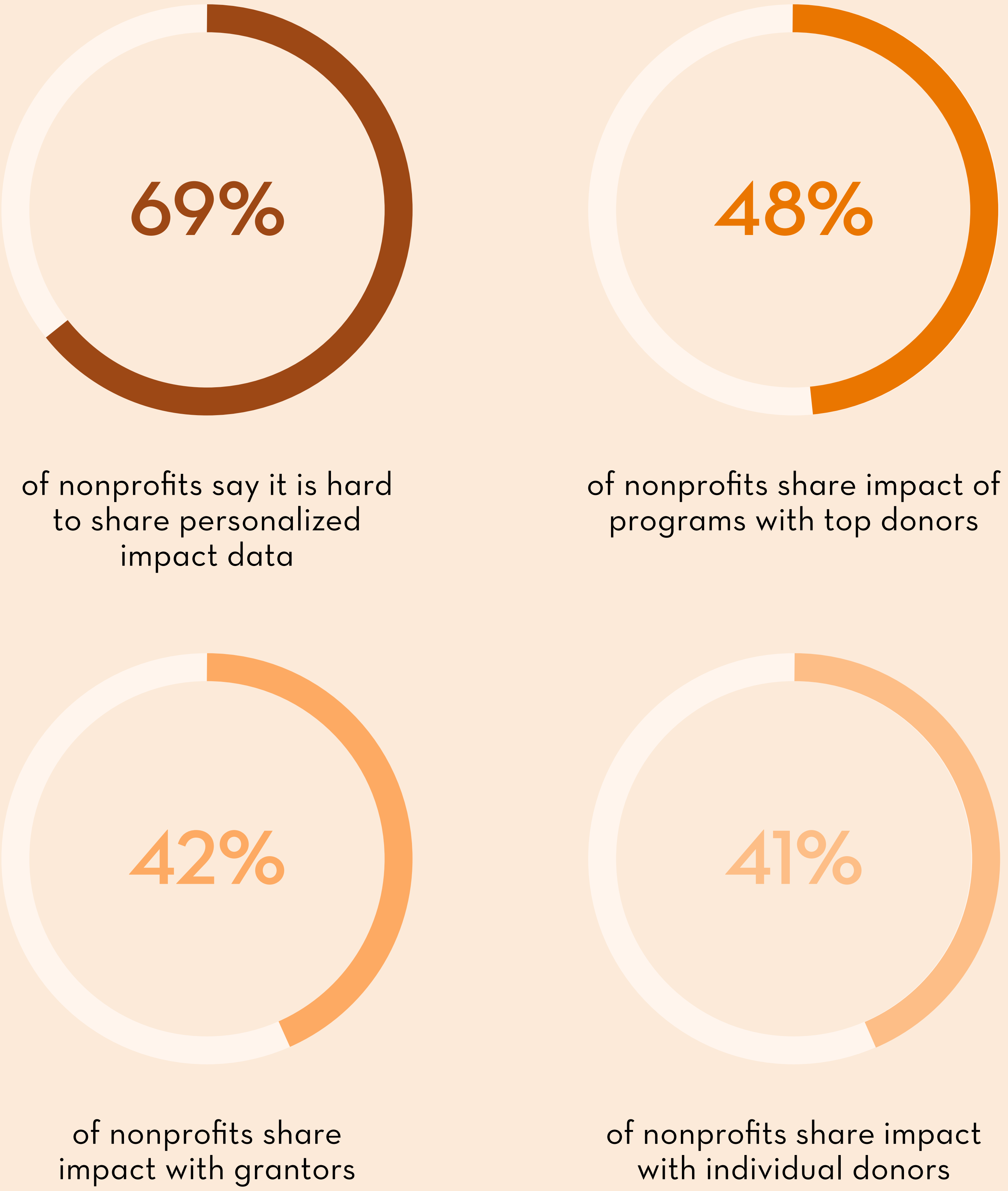
Nonprofits are making changes and investments in a number of funding sources and tactics, showing an increase in digital fundraising across social, web, mobile, and e-commerce.

Supporter Experiences & Fundraising Cont’d

Additionally, **79% of nonprofit fundraising professionals reported that recent political changes have reduced the funds** available for their organization, again placing a higher need for individual donors. As individual donors are also consumers enjoying innovation in their personal lives, their expectations as donors regarding their experiences with nonprofits are also rising. Yet, unlike many for-profit consumer retailers, only half **(51%) of nonprofits measure donor satisfaction** with their experience.

Today’s donors continue to expect more, as **69% of nonprofits say the demand for transparency regarding funding** has increased at least moderately over the past five years, up from 64% in our previous survey. Importantly, **69% also say it is hard to share personalized impact data** from programs with funders, which is a major challenge in providing that transparency. This is typically due to the fact that this data is in multiple places, not digitized or allocated to programs, or they don’t have the analytics tools to report back. **48%** share impact of programs with top donors, **42%** share impact with grantors, and **41%** share impact with individual donors.





75%
of nonprofits reported an increase in demand for programs

In order to meet that demand, nonprofits:

47%
are expanding programs

45%
are creating more awareness for support/advocacy

42%
are expanding partnerships or funding

Client Experiences & Programs

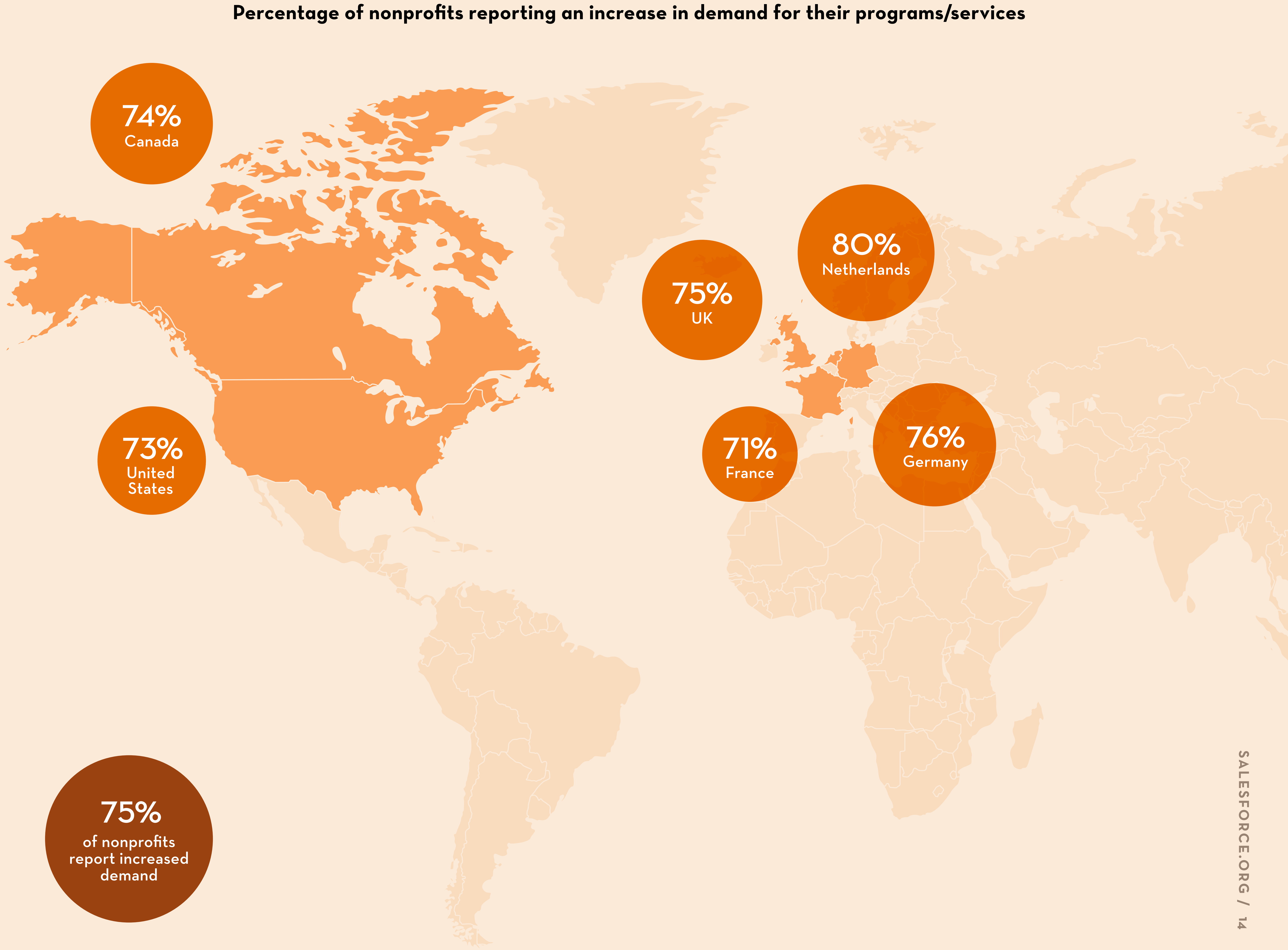
Another perspective on the struggle to meet rising expectations is that **26% of nonprofits say that a lack of transparency and trust directly holds them back** from achieving their mission. To provide transparency, nonprofits need to offer an enjoyable, meaningful, and measurable experience for their clients, partners, and beneficiaries.

In addition, **84% of nonprofit programs professionals say their organization has seen an increase in need** in light of recent political changes, and three-quarters of organizations report that disasters divert funds that might normally be available to their organization.

To compound the challenge, demand is increasing alongside expectations. Over the last five years, **75% of nonprofits reported an increase in demand** for programs, and 34% said the increase in demand was significant. To meet this demand, **47% are expanding programs, 45% are creating more awareness for support/advocacy**, and 42% are expanding partnerships or funding. But many still don't have insight into the quality of experience for the people they serve, as only **58% measure** satisfaction for clients/program participants.

Increase in Demand for Programs by Country

Percentage of Nonprofit Professionals Who Cite the Following as Changes Being Made to Meet Constituent Demands



Potential Strategies & Tactics

When a nonprofit organization begins to shift its institutional mindset to be more constituent-centric, the organization more naturally aligns to meet constituent needs – and exceed expectations.

How can departments best work together to focus on the constituent experience, with a single, holistic view of their clients and ways to engage them? One place to start understanding constituent needs can be surveys, interviews, and analysis of engagement data such as interests and demographics. Then create personas based on this data, and set priorities based on which persona experiences to improve first.

Increase in Demand for Programs by Country

Percentage of nonprofits taking action based on that demand

We are creating more awareness for support/advocacy

United States	60%
United Kingdom	43%
Canada	48%
Netherlands	42%
Germany	33%
France	34%
% Total Respondents	45%

We are expanding our programs

United States	53%
United Kingdom	46%
Canada	48%
Netherlands	40%
Germany	45%
France	44%
% Total Respondents	47%

We are expanding funding/resources

United States	53%
United Kingdom	38%
Canada	38%
Netherlands	43%
Germany	30%
France	37%
% Total Respondents	42%

We are expanding partnerships

United States	51%
United Kingdom	38%
Canada	40%
Netherlands	32%
Germany	41%
France	41%
% Total Respondents	42%

We are implementing and/or scaling our technology and infrastructure

United States	47%
United Kingdom	47%
Canada	33%
Netherlands	40%
Germany	45%
France	28%
% Total Respondents	41%

We are personalizing how we connect with donors

United States	46%
United Kingdom	37%
Canada	51%
Netherlands	44%
Germany	33%
France	32%
% Total Respondents	41%

We are hiring more people

United States	44%
United Kingdom	29%
Canada	40%
Netherlands	40%
Germany	46%
France	31%
% Total Respondents	39%

We are augmenting our staff with volunteers

United States	40%
United Kingdom	37%
Canada	36%
Netherlands	38%
Germany	32%
France	45%
% Total Respondents	38%

Section Two

Data & Measurement Across Departments

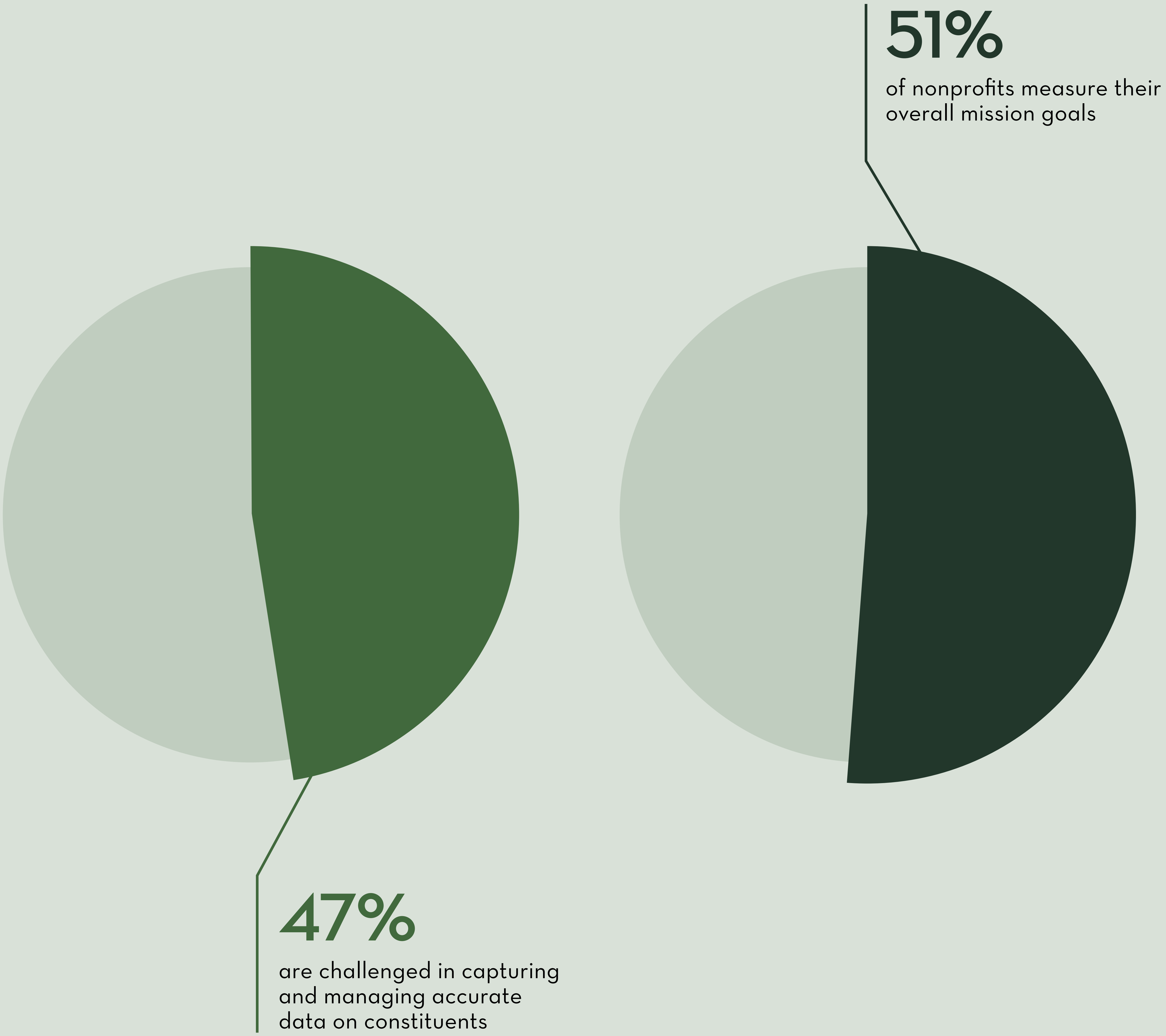
The effective use of data throughout an organization enables it to form deeper relationships in the community, stay agile, and thrive as times change.

Data & Measurement Across Departments

Unlike a century ago, when nonprofits could rely on brand loyalty or workplace-based campaigns for fundraising, today's nonprofits are assessed on their data-based outcomes and quantified impact. Put simply, donors want to know more about what nonprofits are doing with their money. It's not just about being transparent with data, but also how it is shared, and ensuring it is trustworthy and used ethically.

Nonprofits need performance data not only to prove their mission, but also to drive continuous improvement and meet demands to do more with less. For many organizations, this requires a whole new level of data collection, goal setting, automation, and reporting. For nonprofits to effectively connect and make change, they need a common place for organizational knowledge on their constituents, which also acts as a trusted source of data and performance metrics.

The challenge is that many nonprofits do not have the data they need on their constituents. **47%** are substantially or extremely challenged in **capturing and managing accurate data** on constituents, and only **51% of nonprofits actually measure their overall mission goals.** This could be attributed to the fact that a full **75% of respondents say that how to measure and report data is a challenge,** and therefore are unable to do so because of time and resource constraints.



Measuring Marketing Performance

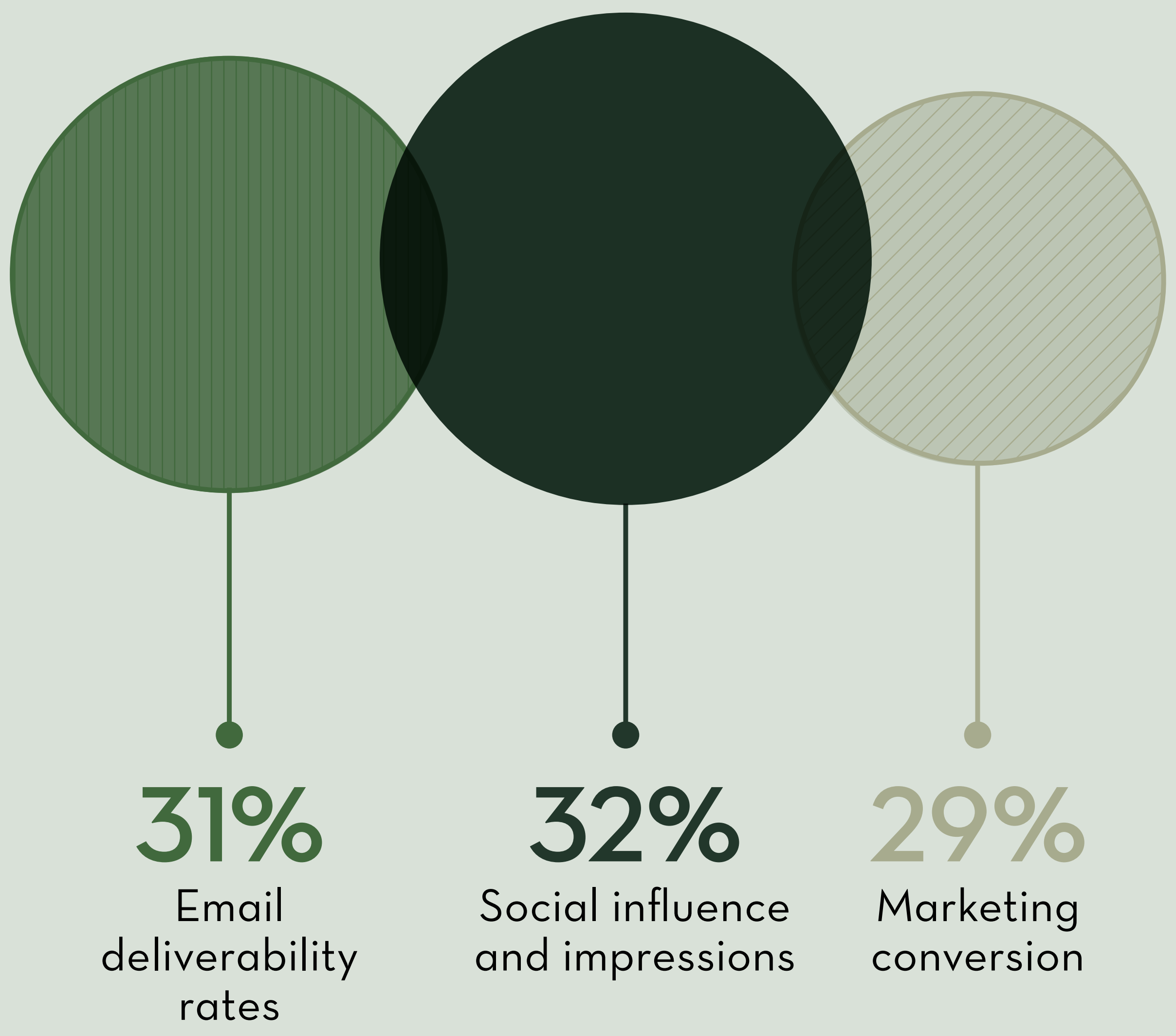
In an increasingly digital world, measurement and testing are critical to marketing success. However, only **45% of respondents said they measure their marketing goals. Less than one-third measure email deliverability, social influence, or marketing conversion.**

Measuring Fundraising Performance

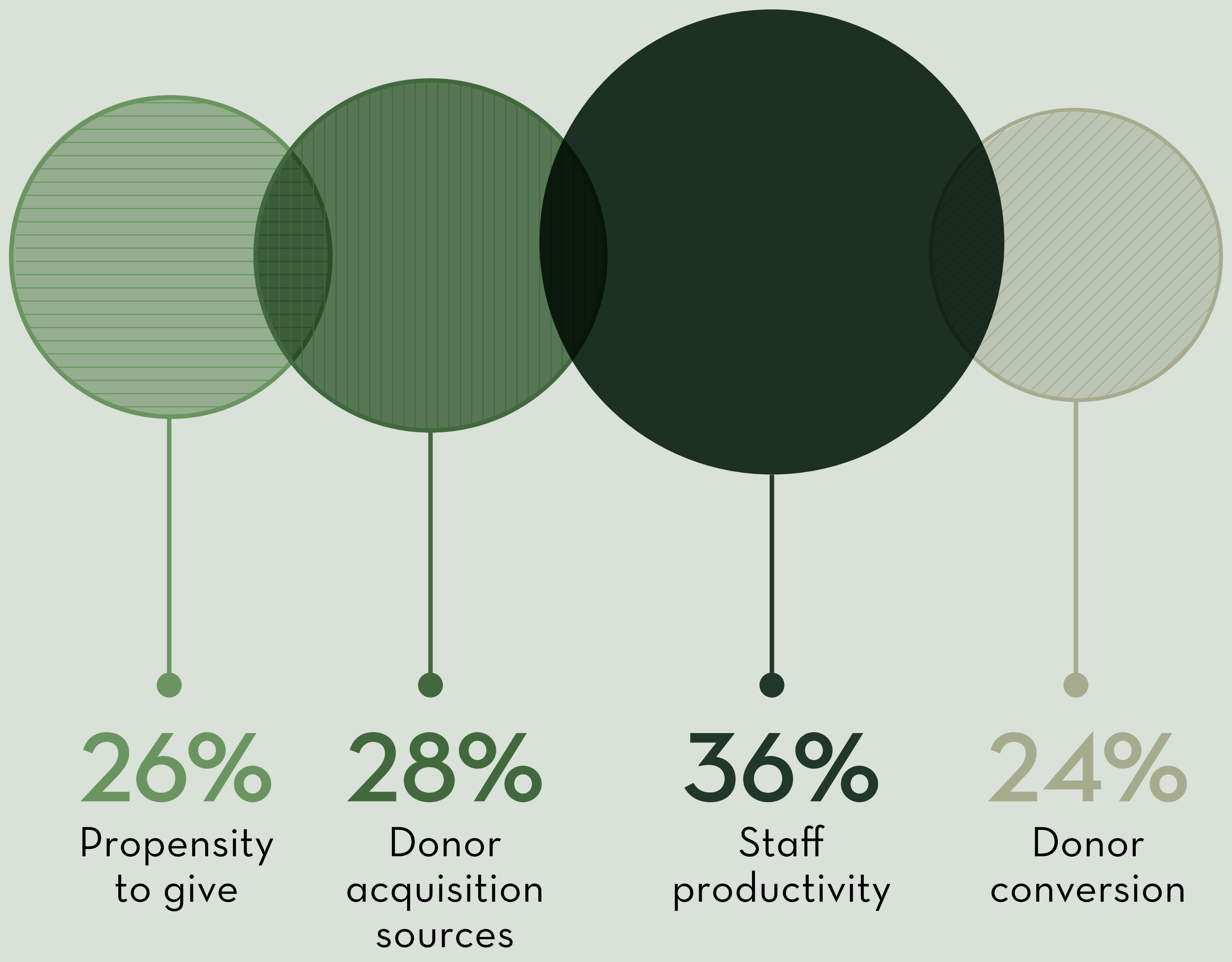
The vast majority (84%) of surveyed nonprofits say they use insights from fundraising data to fine-tune their message, yet the survey also shows that fundraisers have even greater challenges in measurement than marketers, as only **43% measure their fundraising goals.**

This problem increases with specific metrics, as only **28% measure donor acquisition sources, 26% measure propensity to give,** and **24% measure donor conversion.** The Netherlands is more likely to measure donor acquisition sources at 33% over France at 21%. A major reason for this could be that almost half **(47%) feel challenged** in capturing and managing accurate data on constituents.

Percentage of nonprofit professionals that measure marketing performance



Percentage of nonprofit professionals that measure fundraising performance



Percentage of Nonprofits Who Report Out to

Impact of programs with top donors	48%
To board across departments on performance	45%
Budgets and the pay of their executives and staff	43%
Impact with their grantors	42%
Impact with their individual donors (smaller donations)	41%
Major changes within their organization with the world	40%

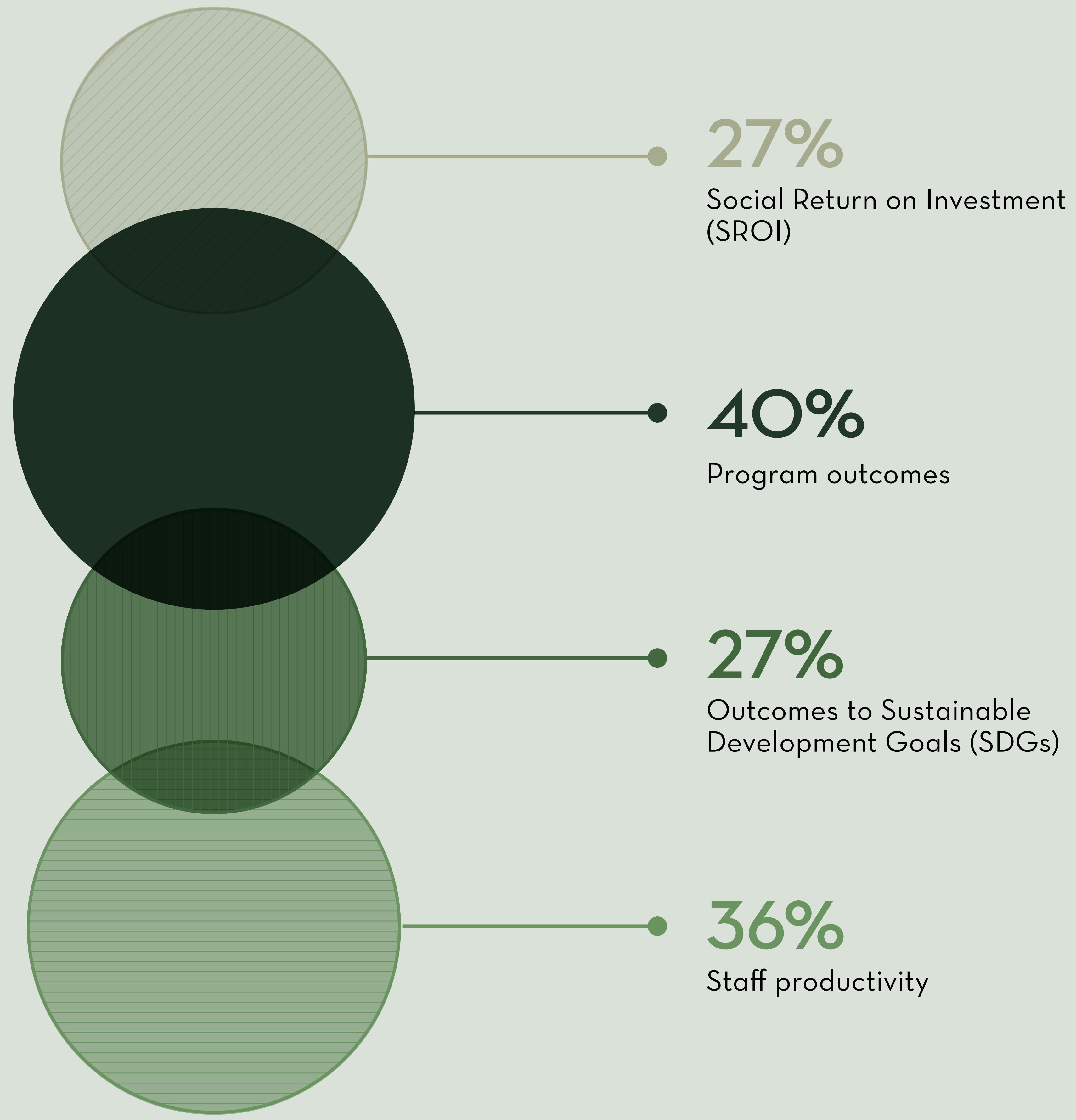
Measuring Program Impact & Operations

Only **44% of respondents say they measure** their impact, and exactly one-half of nonprofits report it is challenging to gain insights from this data to make improvements. An even larger group, **73% of nonprofits, say they can't tell if their programs are effective** or reaching the populations they want to serve. This is a challenge for many nonprofits because measuring impact requires not just internal programs data, but also external data sources on the communities being served.

Potential Strategies & Tactics

Most nonprofits have large sets of data that have been collected, but the effective use of this information can be hampered if it exists in multiple locations. To become a digital-first organization, the data must be centralized in one location to obtain an integrated view of constituents. From here, the organization's leadership must guide the interpretation of the data into human insights, and apply these insights into actionable strategies to serve beneficiaries through automation of programs processes or engage supporters.

Percentage of nonprofit professionals that measure impact and operations



Section Three

Alignment, Access & Change for Technology

Technology offers numerous opportunities to modernize and take strides in solving the problems detailed above.

Alignment, Access & Change for Technology

How can a nonprofit honestly evaluate its programs and strategies – and ultimately, its mission – without digitizing and measuring this crucial data? Nonprofits today require technology to capture and leverage data. Nonprofits need to embed technology as a priority in their core operating strategy. Any "truth" without the benefit of measurable online activities and behaviors is incomplete or inconclusive. Digital is the future direction for nonprofits, but cultural, logistical, and financial barriers to acquiring technology still hold nonprofits back.

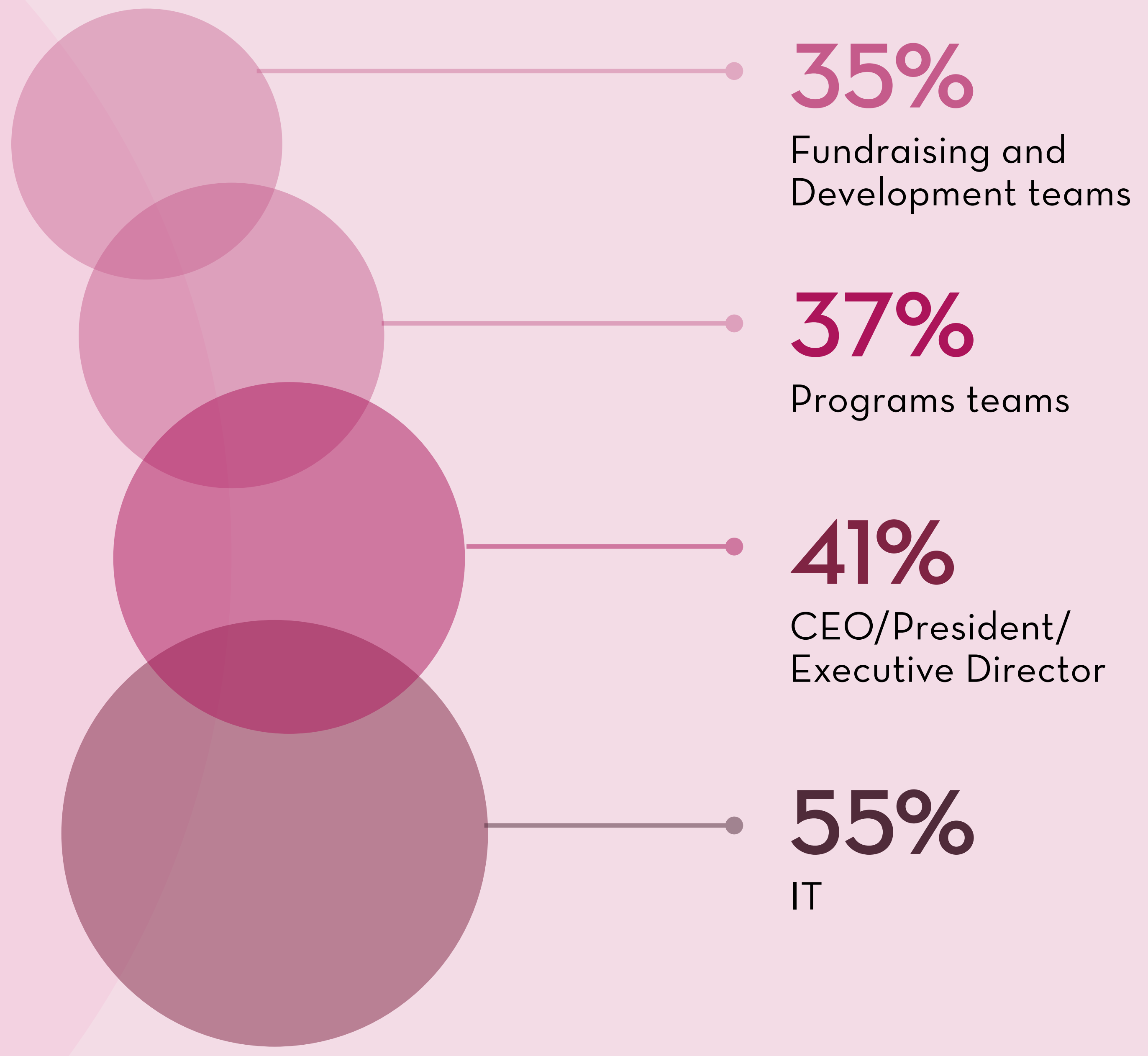
85% of nonprofits surveyed said technology is the key to the success of their organizations. Further, the survey shows that those who have fully aligned strategies supported by data are more likely to succeed. Nonprofits are approaching a crossroads in which they must decide to change and invest in modern technologies, or risk becoming less relevant. Many have begun the journey of digital transformation, but many are still behind, for a range of reasons.

Leadership vision, budget constraints, change management, and adoption difficulties continue to challenge nonprofits attempting to successfully implement technology that provides actionable data. Not many are planning ahead for the digital revolution that is already well underway. **Only 23% have a long-term vision** of how to use technology within their organization. It is more likely in the U.K. to have a long-term vision than in Germany (25% vs. 13%).

Decision-making on technology purchases may not best serve the diverse demands within an organization. For most, decisions are still made chiefly by IT, with **55% responding that IT is the primary champion,** 41% saying CEO/president/executive director, 37% programs teams, and 35% from fundraising and development teams. Germany is more likely than any other EMEA country to have IT be the primary buyer at 67%, whereas the Netherlands is 51%, 50% in France, and 43% in the UK.

Even though the use of holistic CRM solutions is on the rise each year, many still do not have access to key technologies taken for granted in the corporate world. Overcoming budget constraints is often the largest hurdle.

Who champions the use of technology in nonprofits?

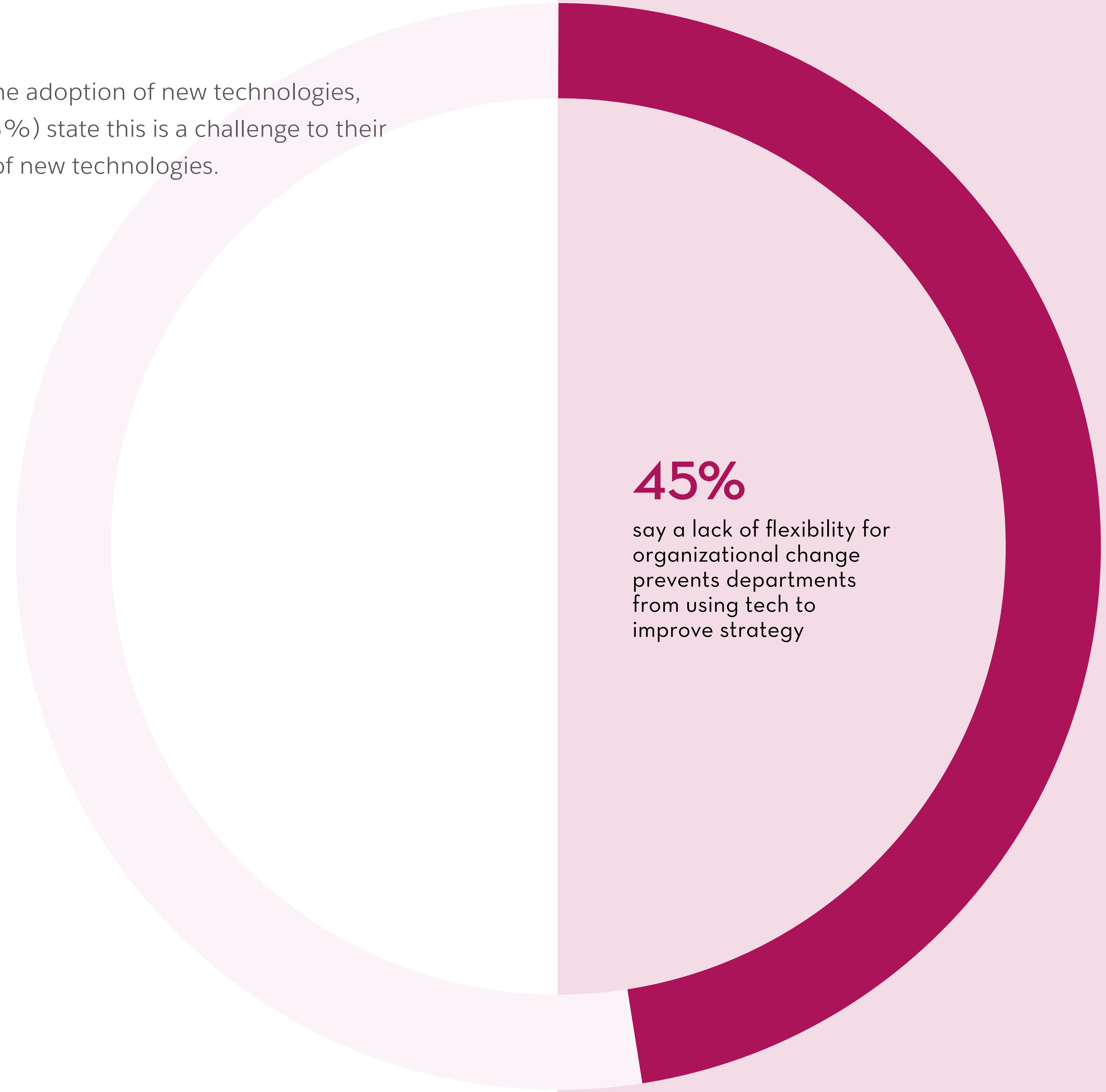


Challenges to Change

Many nonprofits lag behind the corporate world in their use of digital and data-driven marketing strategies. In this survey, **43% of nonprofits in the U.S. reported that their source of funding for technology comes from a separate budget** (i.e. not general operations), versus only 17% in 2018. In Canada, 38% report a separate budget this year versus 27% last year. The U.K. is more likely to have a dedicated technology budget at 16%, versus Germany at 7% and France at 6%.

39% of nonprofits rely on grants to cover technology investments. 11% still do not have a dedicated technology budget, which hinders any major investments in infrastructure. At an organizational level, ingrained purchasing cycles limit nonprofits' ability to buy the technology they need. 51% of respondents cited budgetary constraints as at least a major challenge to technology adoption, and in the U.K. 59% responded to this as a major challenge, and 44% in France. **40% cite not being able to prove return on investment.**

Change management (or its absence) is another prominent factor, as **45% say a lack of flexibility for organizational change prevents** departments from using technology to implement strategy. Change is hard, and organizational rigidity can hinder innovation. Even when an organization is ready for change, nonprofits still need IT staff to implement and train employees. Nearly half (45%) of nonprofits said lack of IT or technical staff is at least a major challenge with the adoption of new technologies, and the vast majority (93%) state this is a challenge to their organization's adoption of new technologies.



Marketing Alignment & Transformation

Marketers work across internal and external groups to ensure the best experience for their constituents. Therefore, alignment with marketing was shown to be a critical factor influencing success in achieving their mission goals. 48% said they exceeded their goals when fundraising and marketing were fully aligned and 46% exceeded their goals when programs and marketing were fully aligned to strategy and data.

Potential Strategies & Tactics

Infusing the use of technology throughout an organization requires support from the very top. Leaders must fully embrace this change, and be able to speak clearly to the entire staff on why technology is imperative to success–not just to meet this year's goals, but for the sustainable future of the nonprofit. For your leaders to be most persuasive, they can use interviews or surveys of staff and constituents, and share this data that points to the need for urgency in technology adoption.

Factors that Pose At Least a Moderate Challenge to the Adoption of New Technologies

Budgetary constraints	81%
Lack of IT or technical staff	77%
Lack of resources to train employees	76%
Lack of flexibility/adaption for organizational growth or change	76%
Implementation and roll-out difficulties	76%
Challenges influencing executives and board members	76%
Difficulty customizing to meet our needs	75%
Inadequate performance for organizational needs	75%
Insufficient user adoption	73%
Not able to prove return on investment	70%

Section Four

Adopting Technology & Using it Comprehensively

The success of any technology, and its adoption across multiple departments in an organization, often depends on putting technology to its fullest use.

Adopting Technology & Using it Comprehensively

While 79% of nonprofits have a CRM system in place, fewer use it strategically across departments, chapters, and teams to effectively market and fundraise, or report back to funders. There is a significant drop-off in the level to which they use it to manage programs and services and deepen engagement with stakeholders. Without full adoption of technology, nonprofits may not get the maximum return on investment they expected, which can hinder both current and future projects.

Staff experience is critically important, as not all feel they have the necessary experience or training to use tools at work. **71% of respondents state that the technology they use at home is more productive** than what they use at their nonprofit.

However, when compared to last year, U.S. nonprofits reported higher confidence in technology to help improve donor relationships, online/digital fundraising, volunteer management, business processes, and impact measurement. In the U.K., confidence increased around online/digital fundraising.

Comparison of Current Usage vs. Planned Usage of Technology

Technology	Currently Use	Plan to within the next year	Plan to within the next 2 years
Customer relationship management	79%	6%	7%
Marketing automation	36%	30%	20%
Social engagement platform	40%	28%	21%
Community platform	35%	29%	19%
Mobile apps for constituents	31%	30%	21%
Artificial Intelligence	26%	30%	21%
Analytics	40%	28%	20%
Internal messaging	39%	26%	22%
Mobile apps for employees	32%	30%	20%
Volunteer Management Systems	35%	30%	20%
Technology upgrade from major donor gifts/commitments	28%	30%	24%
System to manage program/services	43%	26%	21%

Marketing Use & Adoption

Nonprofit marketers rely heavily on CRM technology, but not for all its uses. Although 91% have a core CRM or are planning to use one, only 39% use CRM and social platform engagement, and 38% use CRM along with marketing automation or community platforms.

Nonprofit marketers are making changes to better engage constituents in the digital world, with 56% making changes to social media, 47% on their website, and 43% via digital advertising technologies.

Fundraising Use & Adoption

86% of fundraisers believe technology can replace a lot of manual tasks that divert them from more important activities. Nearly a third (31%) of those who used CRM for donor relationship management exceeded their goals, versus 23% who met or fell short of goals. 37% of those who used Artificial Intelligence exceeded their goals, versus 23% who didn't.

Fundraisers with aging donor bases see technology as a key tool in acquiring new generations of donors, with 39% citing peer-to-peer campaigns, 45% citing volunteers or volunteer referrals, and 44% citing beneficiaries and/or clients as target demographics for potential digital fundraising efforts.

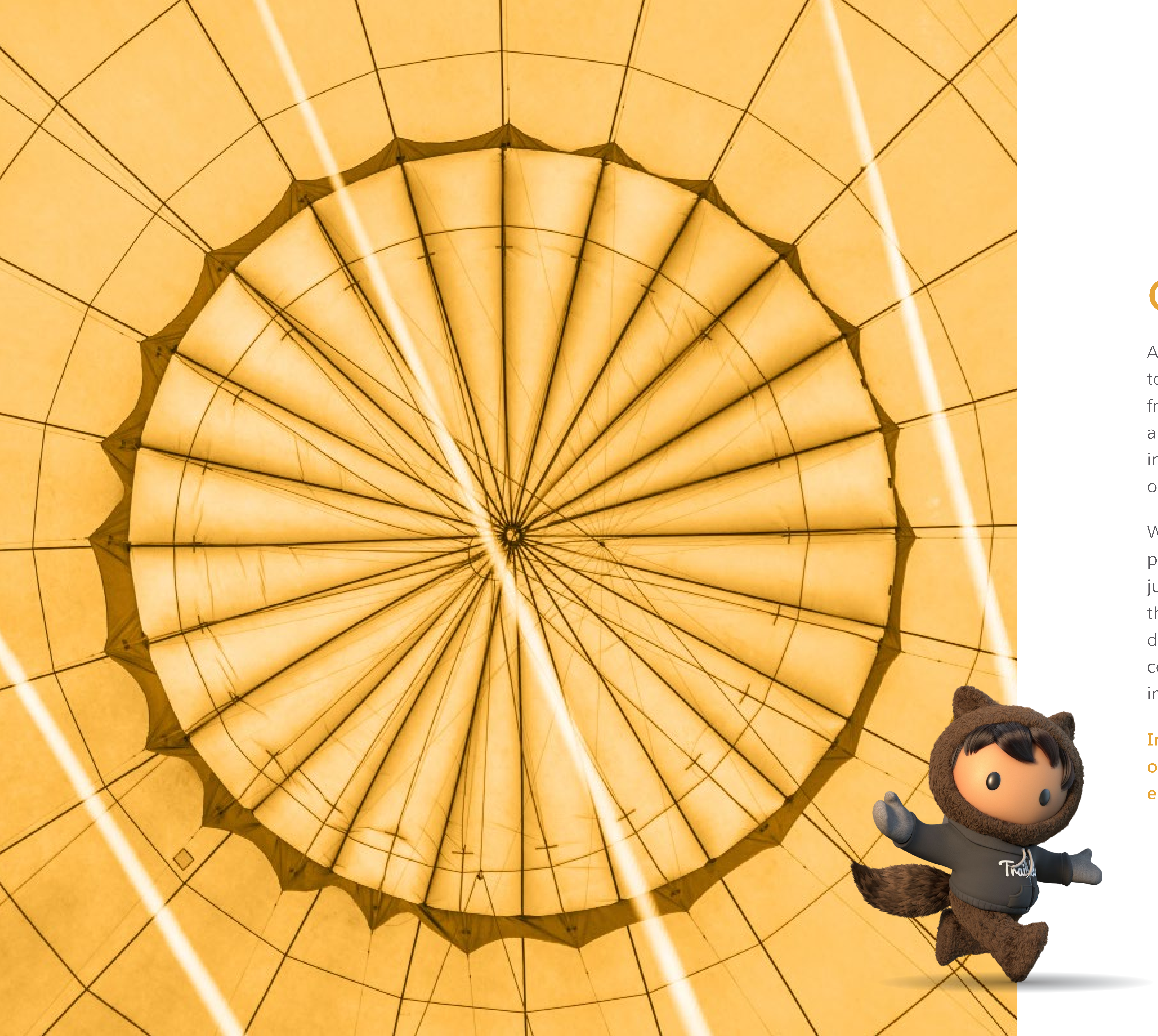
Mobile technology is top-of-mind for fundraisers as they are constantly traveling for meetings, especially with major gift officers. **86% say that "mobile is important to me"** when it comes to fundraising activities. **31% currently use mobile apps for constituents** and 32% use mobile apps for their employees.

Technology becomes increasingly important as fundraising tactics evolve and change, as evidenced by the graphic to the right.

Percentage of Nonprofit Professionals Whose Organizations Use or Plan to Use the Following Fundraising Campaigns or Tactics In the Next 12-18 Months

	Currently Use	Plan to use in 1-2 years	Projected 2-year growth
Mobile/SMS text campaigns	32%	49%	+153%
Peer-to-peer fundraising	35%	51%	+148%
Donor advised funds	33%	48%	+146%
Selling goods or services	37%	47%	+127%
Other grants	34%	43%	+125%
Membership	37%	45%	+122%
Annual giving campaigns	40%	48%	+121%
Major gifts (large donations)	39%	47%	+121%
Corporate grants	39%	47%	+120%
Website donation portals	41%	48%	+117%
Private or family foundation grants	41%	46%	+112%
Advertising on social platforms	43%	47%	+111%
Government grants	42%	46%	+110%
Events	42%	46%	+109%
Direct mail/direct response campaigns	41%	45%	+107%
Social media campaigns	45%	43%	+96%
Email campaigns	45%	43%	+96%

Conclusion



Conclusion

Anyone who works in the nonprofit world, from board members to those in our communities around the world, can reap benefits from using today's CRM technology to drive their mission. As needs and expectations in the digital world rise, the world we operate in demands nonprofits have modern technology. The world we operate in demands that nonprofits have modern technology.

When adopted widely across an organization, these holistic platforms can help nonprofits "do more with less." This is not just because they help staff be more productive, but because they capture and retain useful data, help analyze trends and drive coherent strategies, and help communicate with diverse constituents and communities in meaningful, personal, and impactful ways.

In essence, they become engines of change within an organization, so your organization can become a truly effective engine of change in the world.

Country Profiles

Organization Sizes, Causes, & Department Details

Totals

Role Within Organization	Base	Percent
Owner or equivalent	23	3%
Board of Directors, Chairman, or equity owner	50	7%
President or CEO	109	15%
Other executive mgmt (CMO, CTO, CIO, CFO, etc.)	81	11%
Vice president or equivalent	63	9%
Director or equivalent	142	20%
Manager or equivalent	196	27%
Analyst or equivalent	20	3%
Generalist, staff, associate, or equivalent	28	4%
Coordinator, administrator, or equivalent	13	2%

Primary Cause Supported	Base	Percent
Arts, culture, and humanities	67	9%
Education and youth development	87	12%
Environment and animals	57	8%
Religion related	38	5%
Foundations	29	4%
Health	54	7%
Human services	160	22%
International development	39	5%
Humanitarian aid	39	5%
Public and societal benefit	141	19%
Other	14	2%

Department	Base	Percent
Programs	264	36%
Fundraising	227	31%
Grants management	241	33%
Technology	313	43%
HR/Office	242	33%
Marketing	217	30%
Other	65	9%

Employees

Local / Chapter Level	Base	Percent
1 to 25 employees	179	25%
26 to 59 employees	252	35%
60 to 250 employees	179	25%
More than 250 employees	63	9%
Does not apply (i.e., we don't have chapters)	52	7%

Entire Organization	Base	Percent
1 to 25 employees	63	9%
26 to 59 employees	63	9%
60 to 100 employees	95	13%
101 to 250 employees	182	25%
251 to 500 employees	151	21%
501 to 3,500 employees	126	17%
3,501 to 10,000 employees	26	4%
More than 10,000 employees	19	3%

United States

200 Nonprofit Professionals

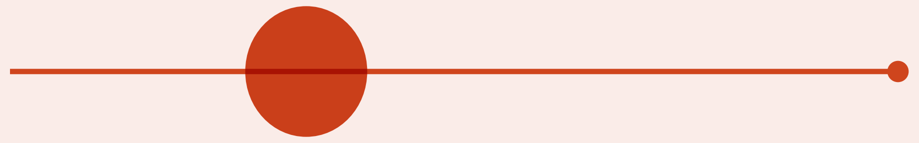
Creating Meaningful Constituent Experiences

51% measure donor satisfaction

67% measure client/program participants

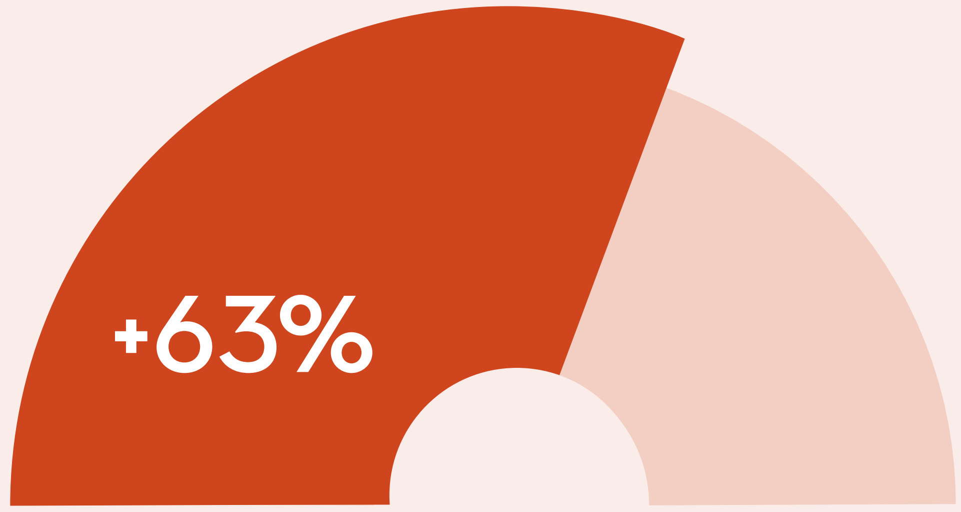
35%

stated that changes in government funding have affected their ability to deliver on their mission



+77%

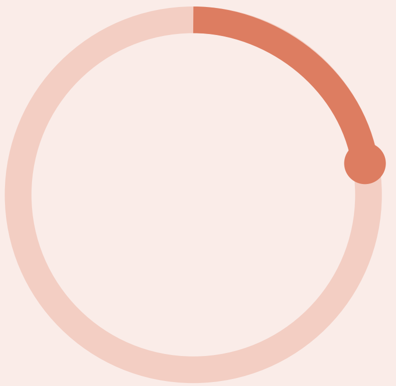
say constituents' desire to participate in their organizations has increased over the past 5 years



The majority have stated there has been an increase in demand for transparency over the past 5 years

24%

state that there is a lack of trust and transparency



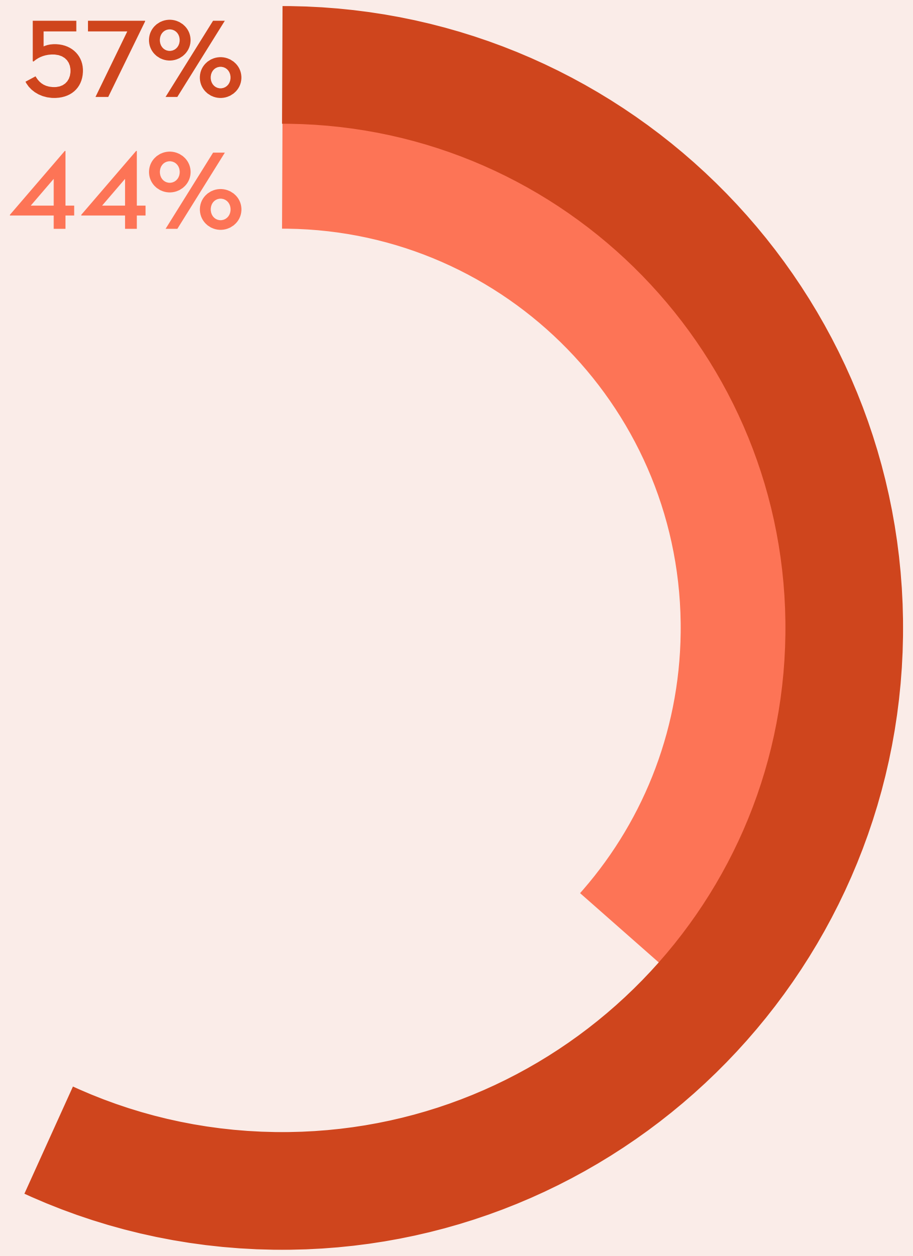
Data & Measurement Across Departments

64% measure overall mission goals

58% measure marketing goals

36% measure donor acquisition

28% measure donor coversion



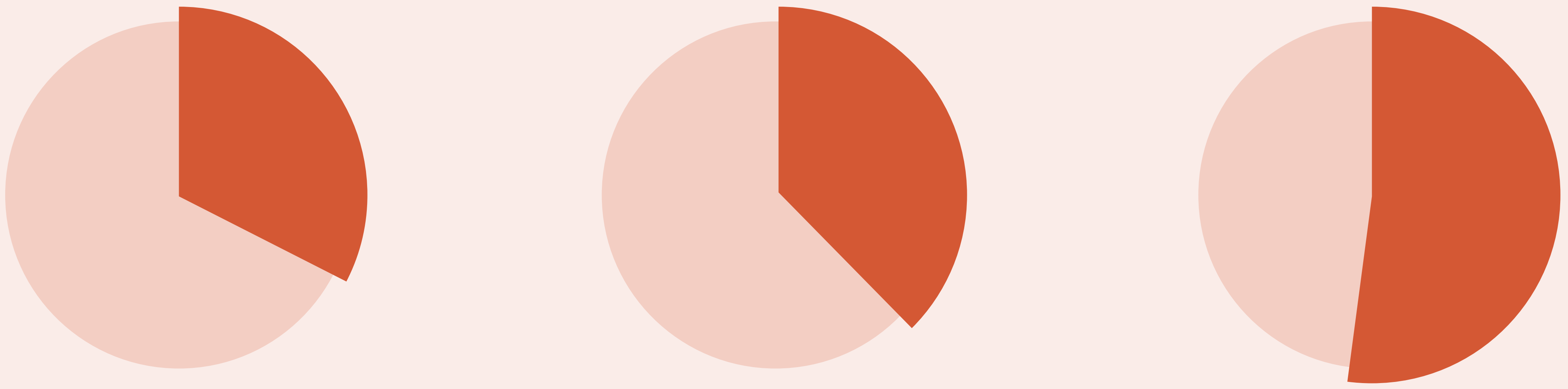
44% say that capturing and managing accurate data on constituents is at least a substantial challenge

57% (majority) state it is hard to understand if their programs are effective and/or reaching the population they set out to serve

United States
200 Nonprofit Professionals

Alignment, Access & Change for Technology

Challenges nonprofits face to adopt new technologies



30%
say that have a long-term vision for all their technology

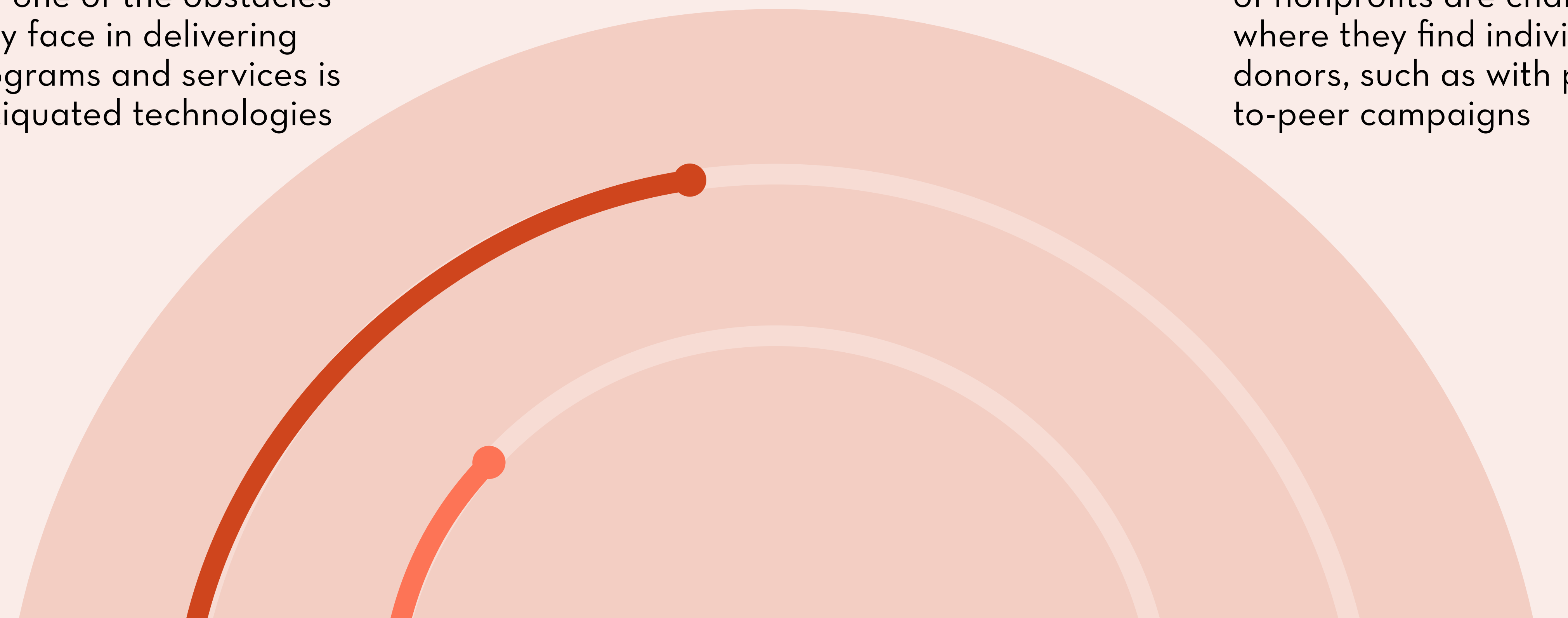
35%
state that not being able to prove return on investment is at least a major challenge

52%
state their fundraising and marketing teams are fully aligned on strategy and data

Adoption Technology & Using it Comprehensively

22%
say one of the obstacles they face in delivering programs and services is antiquated technologies

46%
of nonprofits are changing where they find individual donors, such as with peer-to-peer campaigns



Comparison of Current Usage vs. Planned Usage of Technology

Technology	Currently Use	Plan to with the next year	Plan to within the next 2 years
CRM	75%	6%	8%
Marketing automation	46%	22%	14%
Social engagement	55%	26%	9%
Community platform	39%	27%	12%
Mobile apps for constituents	35%	22%	21%

Canada

105 Nonprofit Professionals

Creating Meaningful Constituent Experiences

51% measure donor satisfaction

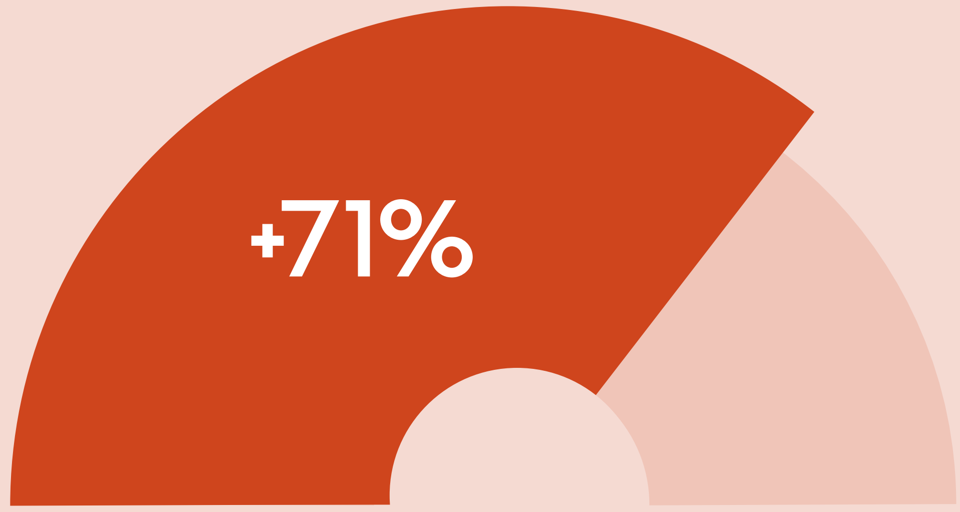
59% measure client/program participants

34%

stated that changes in government funding have affected their ability to deliver on their mission

+72%

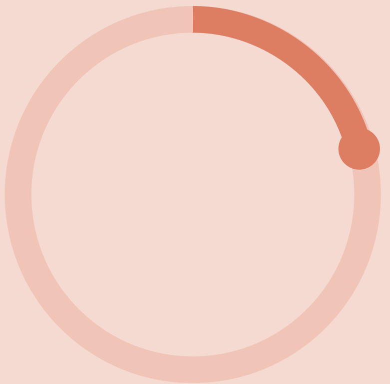
say constituents' desire to participate in their organizations has increased over the past 5 years



The majority have stated there has been an increase in demand for transparency over the past 5 years

23%

state that there is a lack of trust and transparency



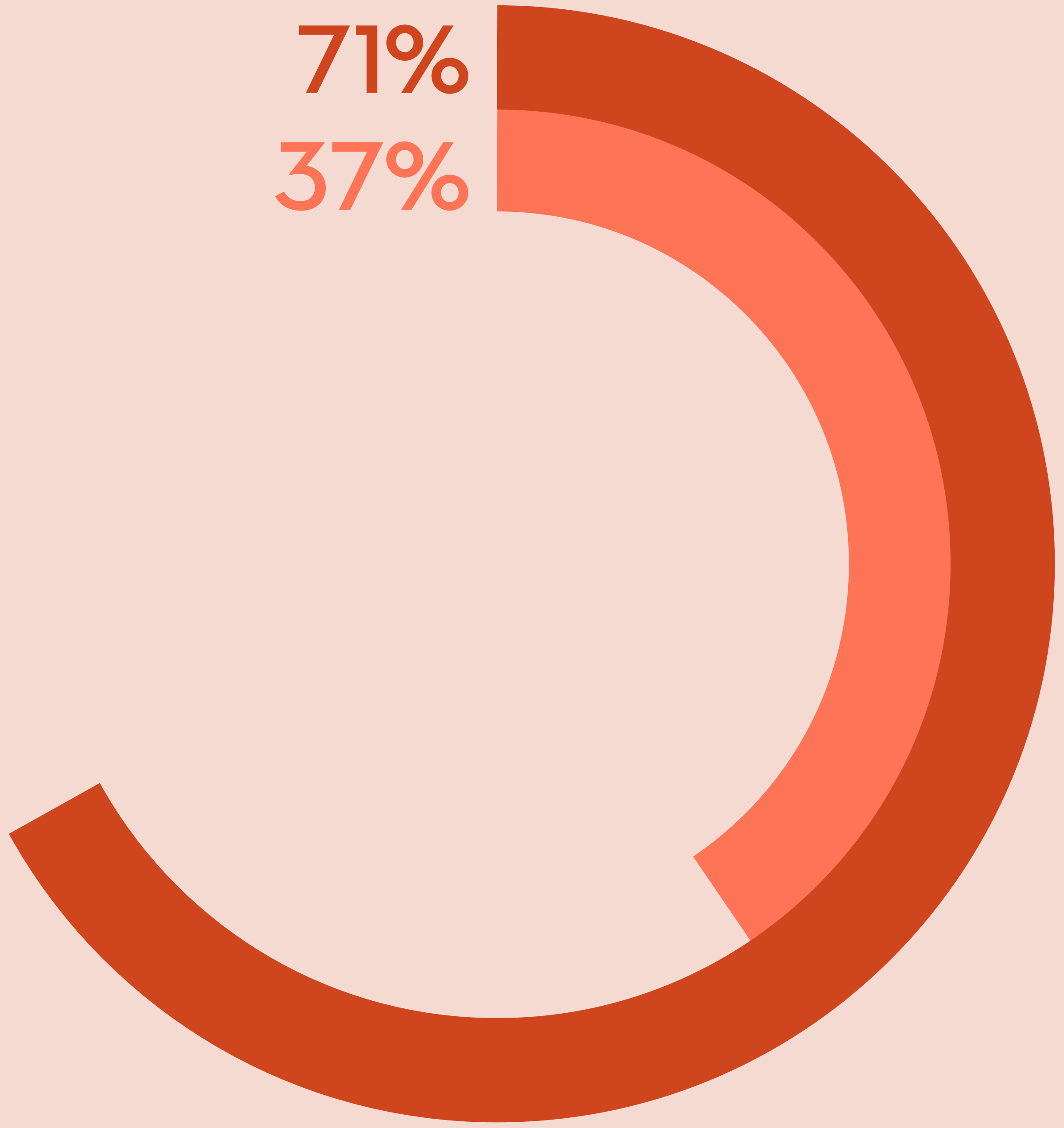
Data & Measurement Across Departments

53% measure overall mission goals

40% measure marketing goals

31% measure donor acquisition

21% measure donor coversion



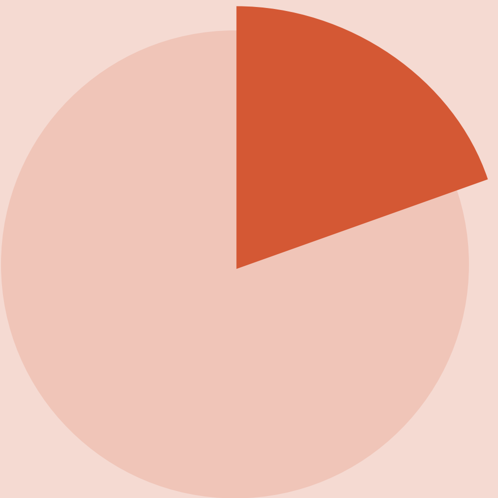
37% say that capturing and managing accurate data on constituents is at least a substantial challenge

71% state it is hard to understand if their programs are effective and/or reaching the population they set out to serve

Canada
105 Nonprofit Professionals

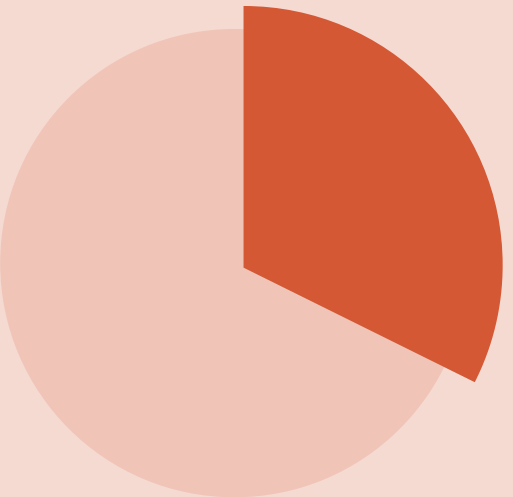
Alignment, Access & Change for Technology

Challenges nonprofits face to adopt new technologies



21%
say that have a long-term vision for all their technology

34%
state that not being able to prove return on investment is at least a major challenge

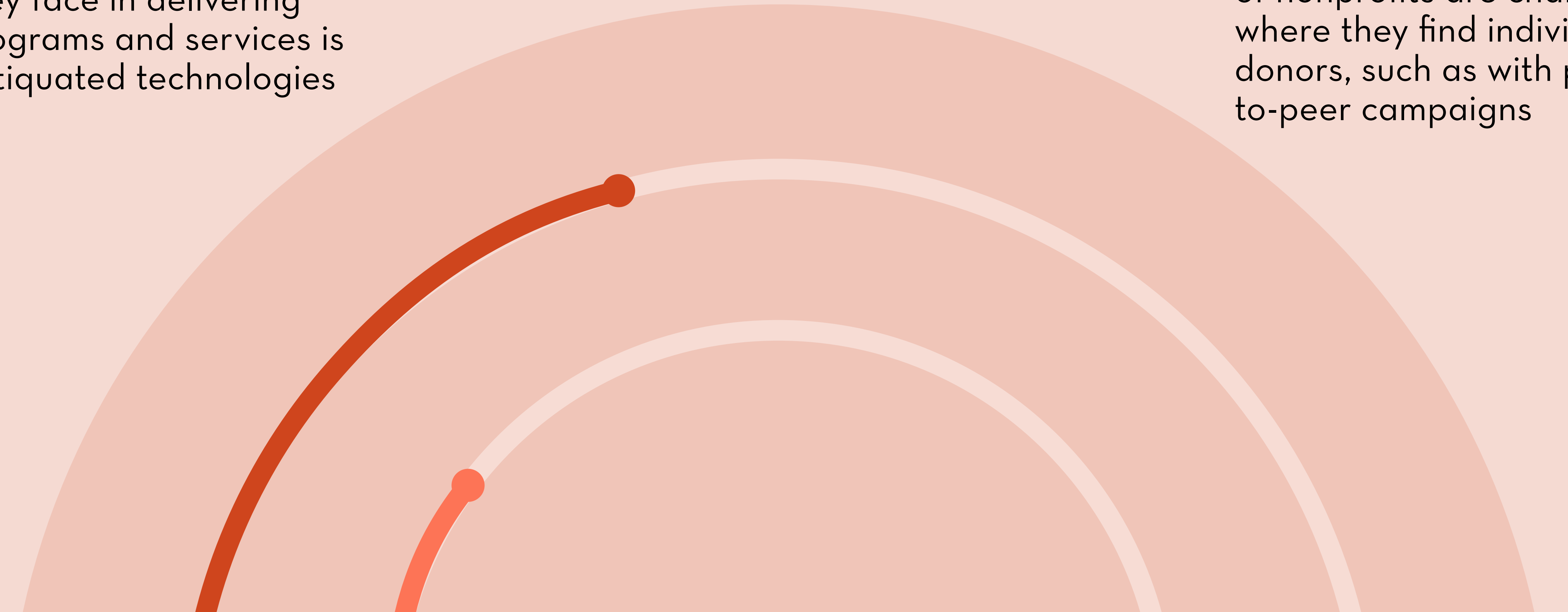


31%
state their fundraising and marketing teams are fully aligned on strategy and data

Adoption Technology & Using it Comprehensively

20%
say one of the obstacles they face in delivering programs and services is antiquated technologies

38%
of nonprofits are changing where they find individual donors, such as with peer-to-peer campaigns

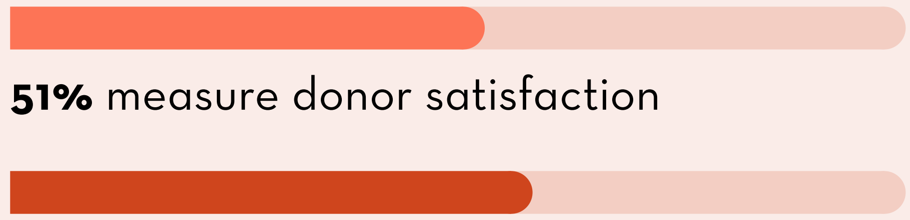


Comparison of Current Usage vs. Planned Usage of Technology

Technology	Currently Use	Plan to with the next year	Plan to within the next 2 years
CRM	79%	5%	6%
Marketing automation	35%	32%	18%
Social engagement	34%	33%	22%
Community platform	37%	28%	22%
Mobile apps for constituents	30%	34%	19%

United Kingdom
102 Nonprofit Professionals

Creating Meaningful Constituent Experiences

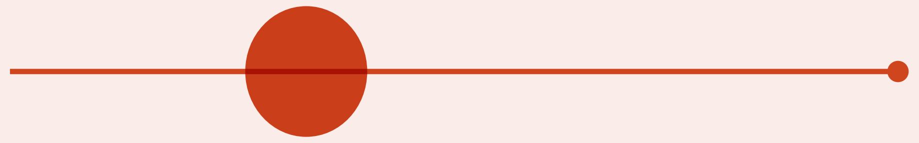


51% measure donor satisfaction

64% measure client/program participants

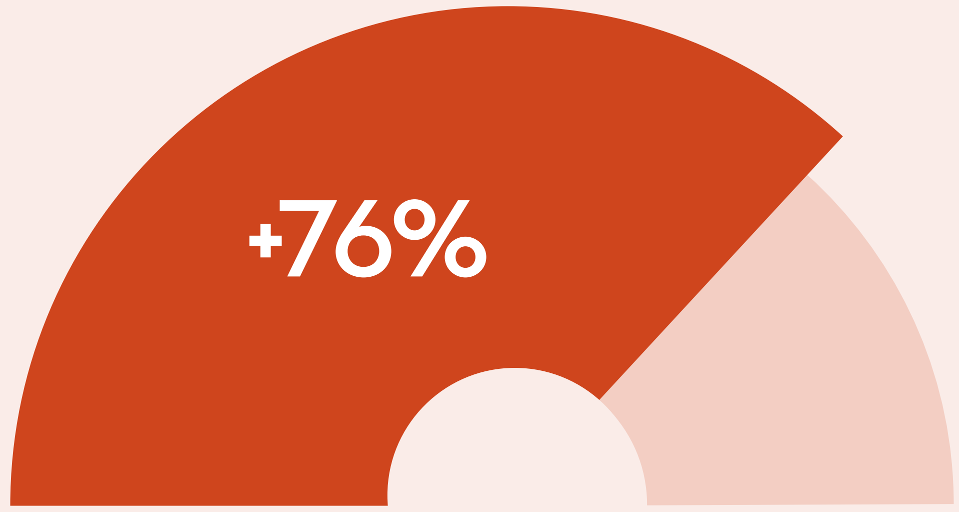
35%

stated that changes in government funding have affected their ability to deliver on their mission



+74%

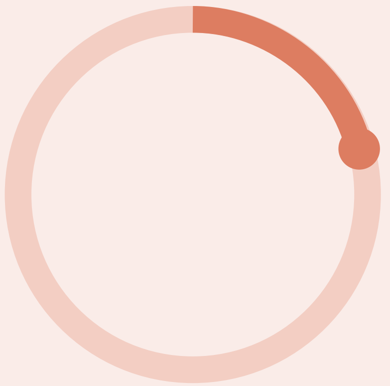
say constituents' desire to participate in their organizations has increased over the past 5 years



More than three quarters have stated there has been an increase in demand for transparency over the past 5 years

23%

state that there is a lack of trust and transparency



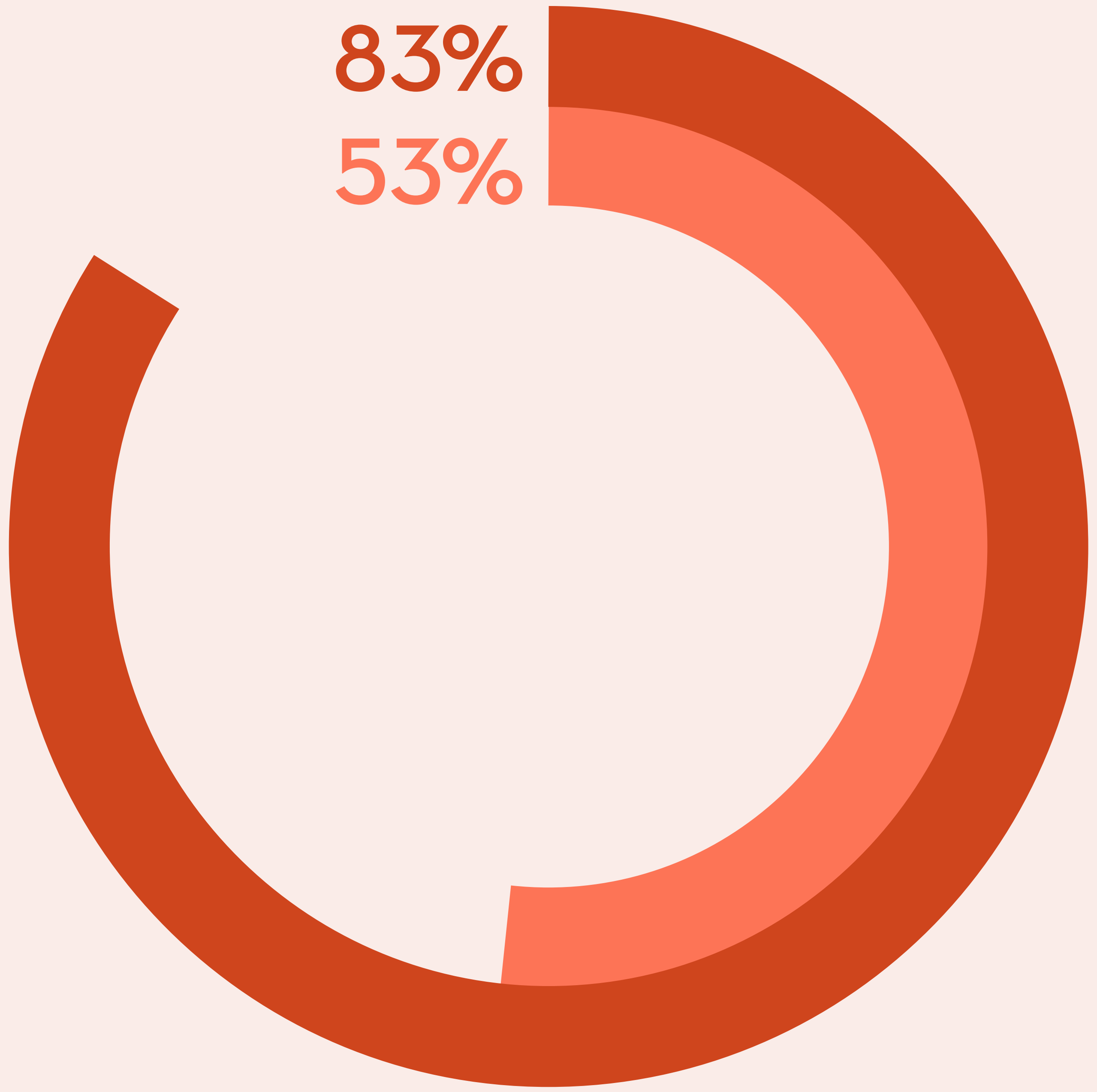
Data & Measurement Across Departments

51% measure overall mission goals

47% measure marketing goals

19% measure donor acquisition

20% measure donor coversion



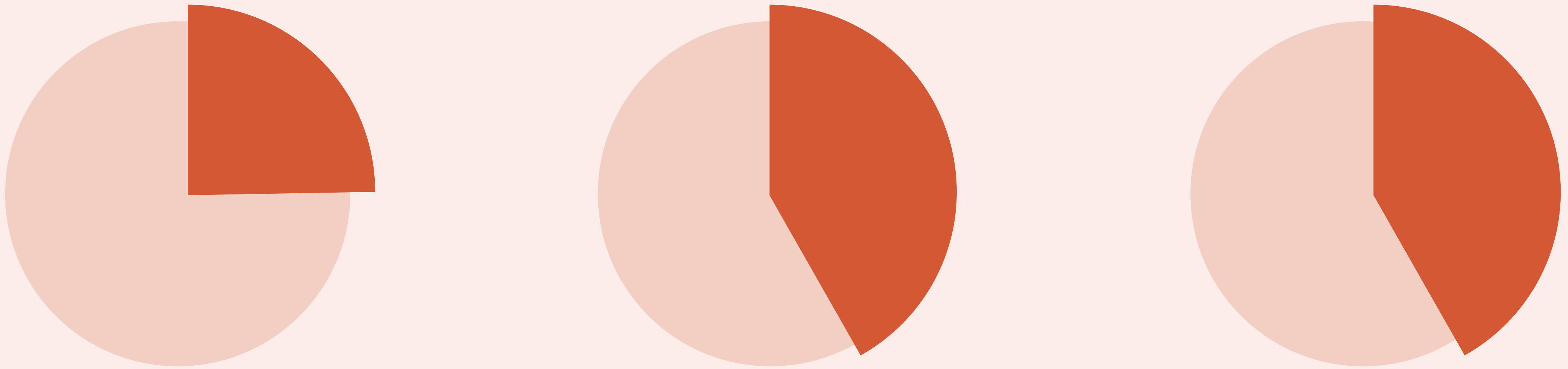
53% say that capturing and managing accurate data on constituents is at least a substantial challenge

83% state it is hard to understand if their programs are effective and/or reaching the population they set out to serve

United Kingdom
102 Nonprofit Professionals

Alignment, Access & Change for Technology

Challenges nonprofits face to adopt new technologies



25%
say that have a long-term vision for all their technology

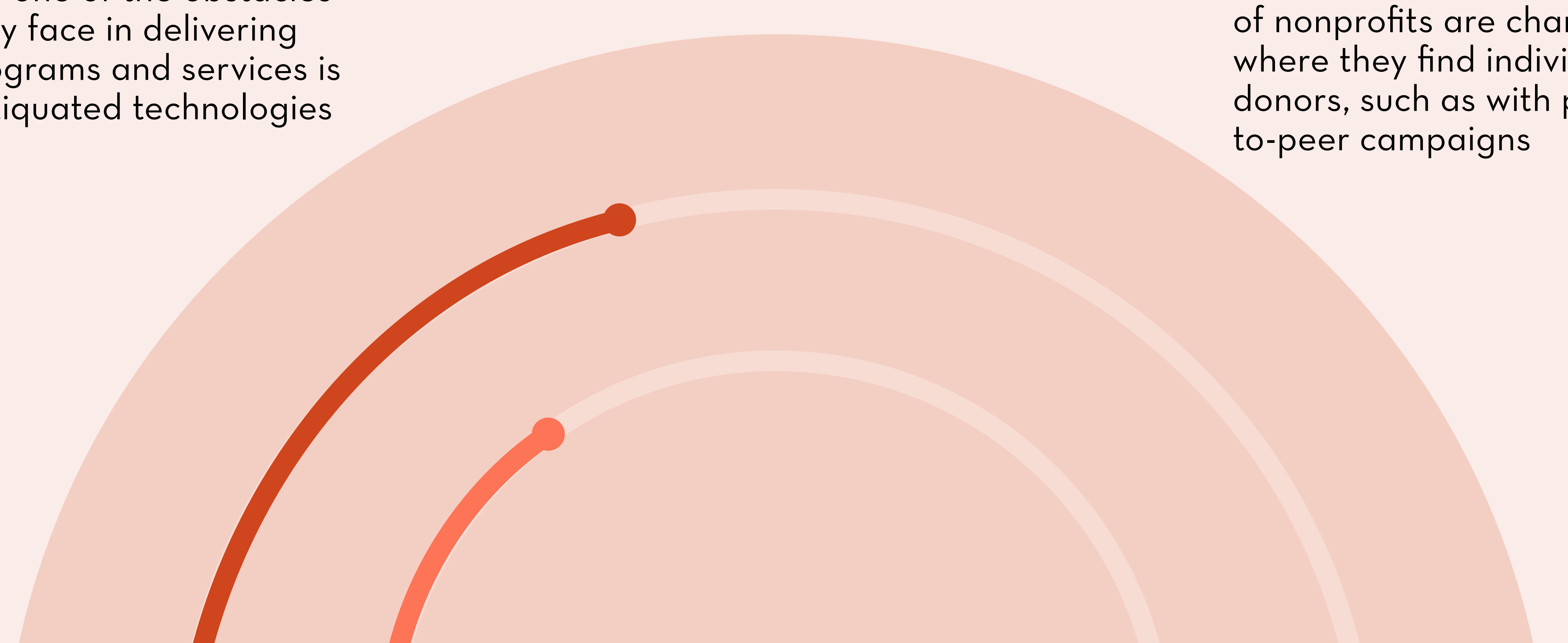
42%
state that not being able to prove return on investment is at least a major challenge

42%
state their fundraising and marketing teams are fully aligned on strategy and data

Adoption Technology & Using it Comprehensively

28%
say one of the obstacles they face in delivering programs and services is antiquated technologies

40%
of nonprofits are changing where they find individual donors, such as with peer-to-peer campaigns



Comparison of Current Usage vs. Planned Usage of Technology

Technology	Currently Use	Plan to with the next year	Plan to within the next 2 years
CRM	83%	6%	3%
Marketing automation	34%	29%	17%
Social engagement	42%	21%	9%
Community platform	37%	23%	24%
Mobile apps for constituents	30%	27%	21%

France

107 Nonprofit Professionals

Creating Meaningful Constituent Experiences

52% measure donor satisfaction

53% measure client/program participants

34%

stated that changes in government funding have affected their ability to deliver on their mission

+62%

say constituents' desire to participate in their organizations has increased over the past 5 years

More than three quarters have stated there has been an increase in demand for transparency over the past 5 years

33%

state that there is a lack of trust and transparency

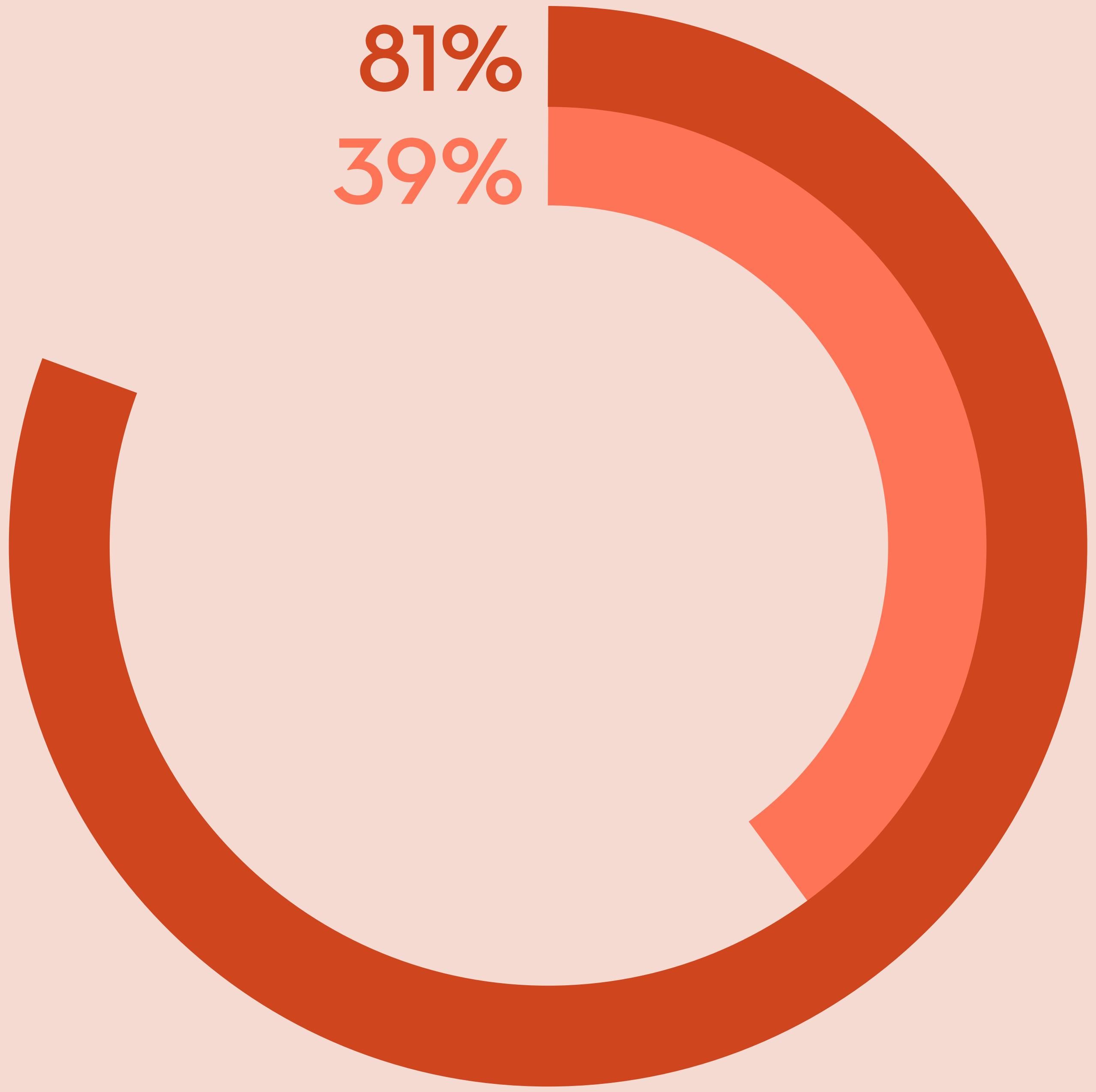
Data & Measurement Across Departments

48% measure overall mission goals

28% measure marketing goals

21% measure donor acquisition

24% measure donor coversion



39% say that capturing and managing accurate data on constituents is at least a substantial challenge

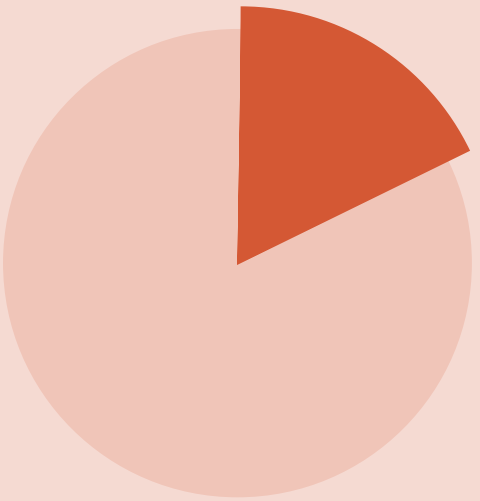
81% state it is hard to understand if their programs are effective and/or reaching the population they set out to serve

France

107 Nonprofit Professionals

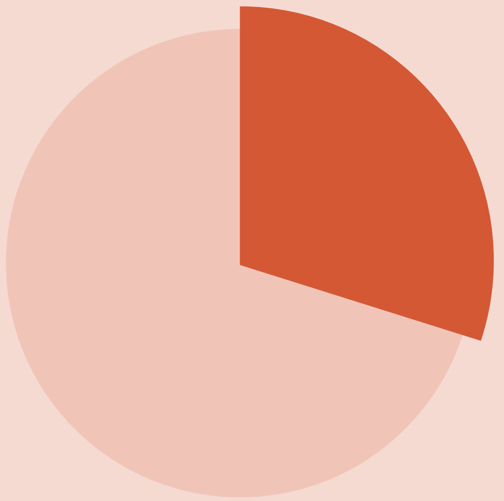
Alignment, Access & Change for Technology

Challenges nonprofits face to adopt new technologies



22%
say that have a long-term vision for all their technology

41%
state that not being able to prove return on investment is at least a major challenge

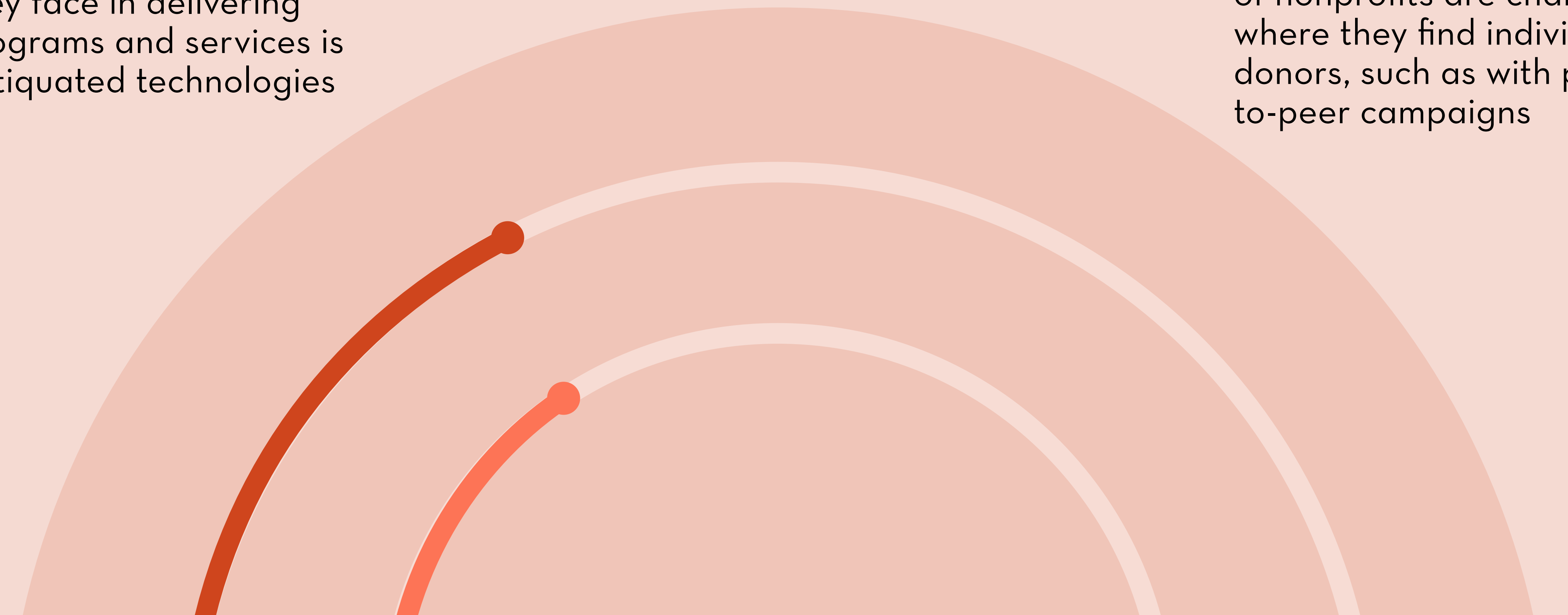


29%
state their fundraising and marketing teams are fully aligned on strategy and data

Adoption Technology & Using it Comprehensively

27%
say one of the obstacles they face in delivering programs and services is antiquated technologies

32%
of nonprofits are changing where they find individual donors, such as with peer-to-peer campaigns



Comparison of Current Usage vs. Planned Usage of Technology

Technology	Currently Use	Plan to with the next year	Plan to within the next 2 years
CRM	71%	8%	9%
Marketing automation	29%	33%	24%
Social engagement	27%	27%	26%
Community platform	40%	27%	20%
Mobile apps for constituents	35%	29%	22%

Netherlands
108 Nonprofit Professionals

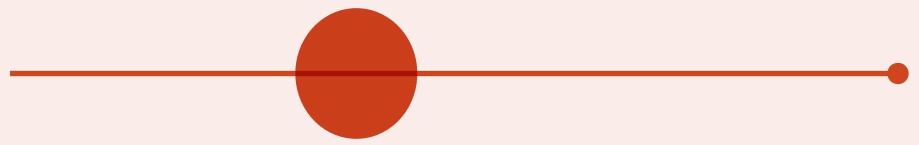
Creating Meaningful Constituent Experiences

58% measure donor satisfaction

53% measure client/program participants

42%

More than a third stated that changes in government funding have affected their ability to deliver on their mission



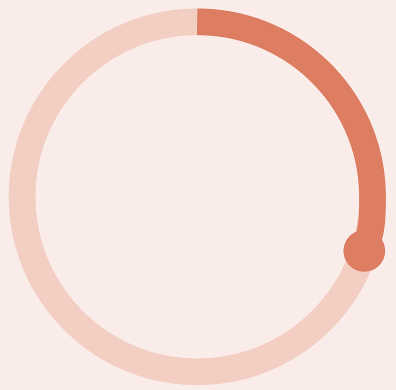
+76%

say constituents' desire to participate in their organizations has increased over the past 5 years

have stated there has been an increase in demand for transparency over the past 5 years

32%

state that there is a lack of trust and transparency



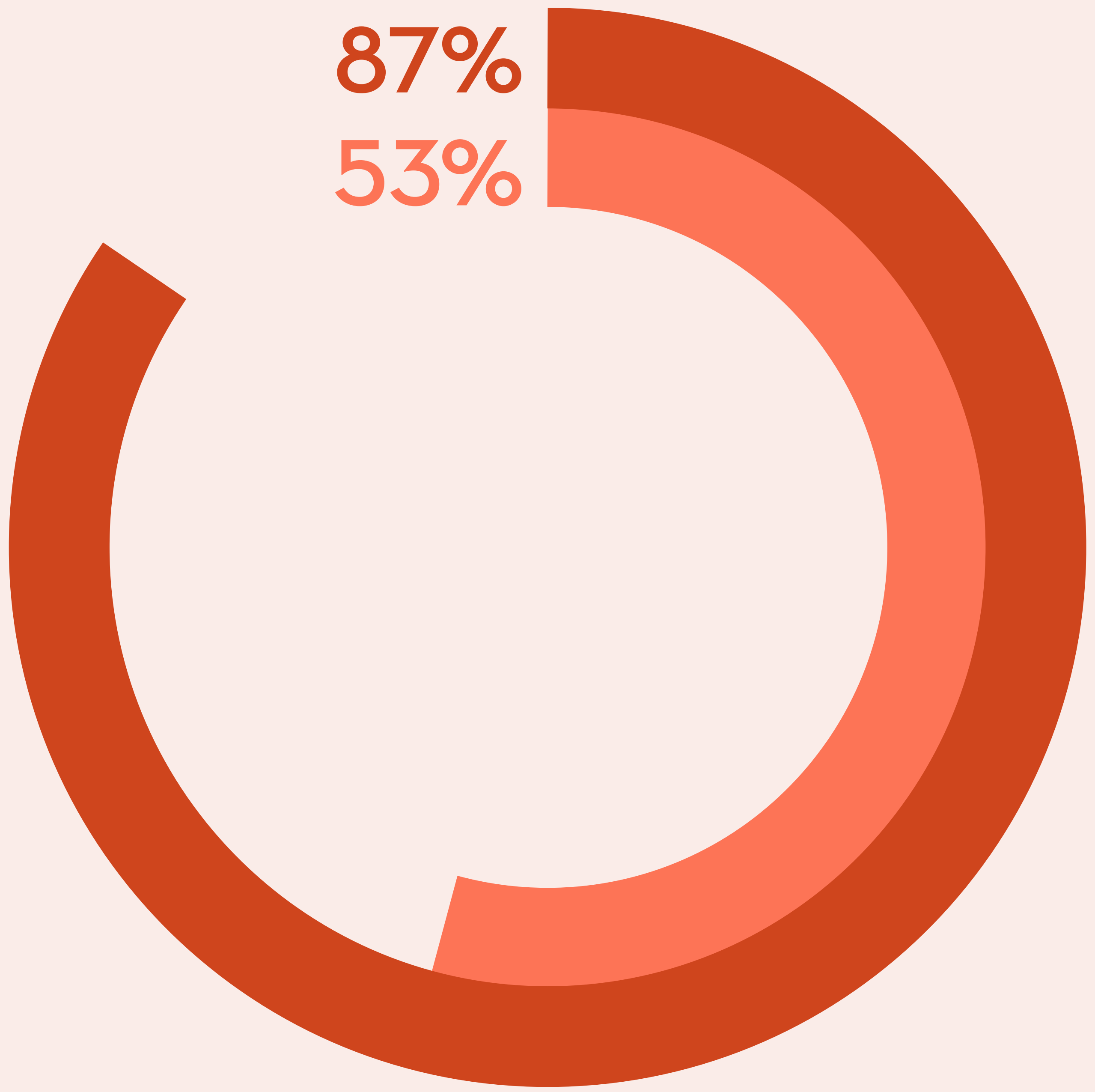
Data & Measurement Across Departments

44% measure overall mission goals

44% measure marketing goals

33% measure donor acquisition

32% measure donor coversion



55% say that capturing and managing accurate data on constituents is at least a substantial challenge

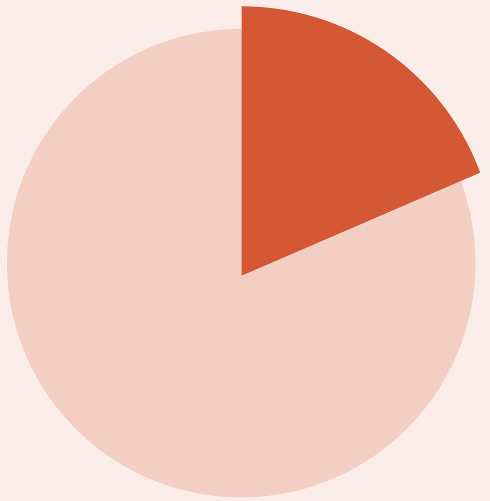
87% state it is hard to understand if their programs are effective and/or reaching the population they set out to serve

Netherlands

108 Nonprofit Professionals

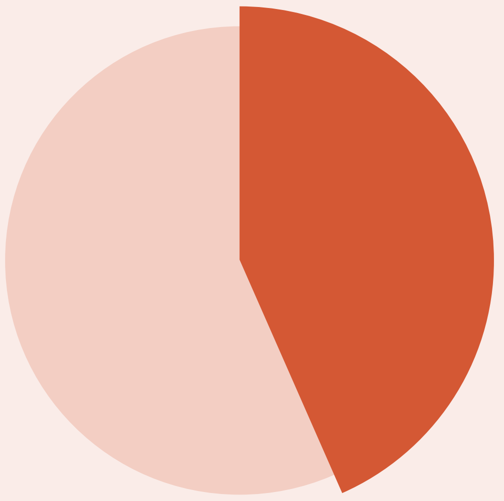
Alignment, Access & Change for Technology

Challenges nonprofits face to adopt new technologies



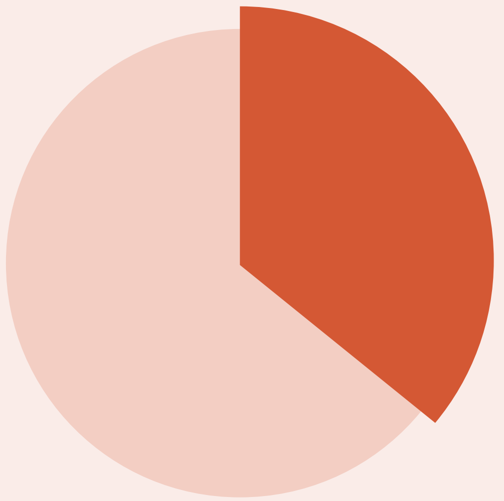
22%

say that have a long-term vision for all their technology



44%

state that not being able to prove return on investment is at least a major challenge



36%

state their fundraising and marketing teams are fully aligned on strategy and data

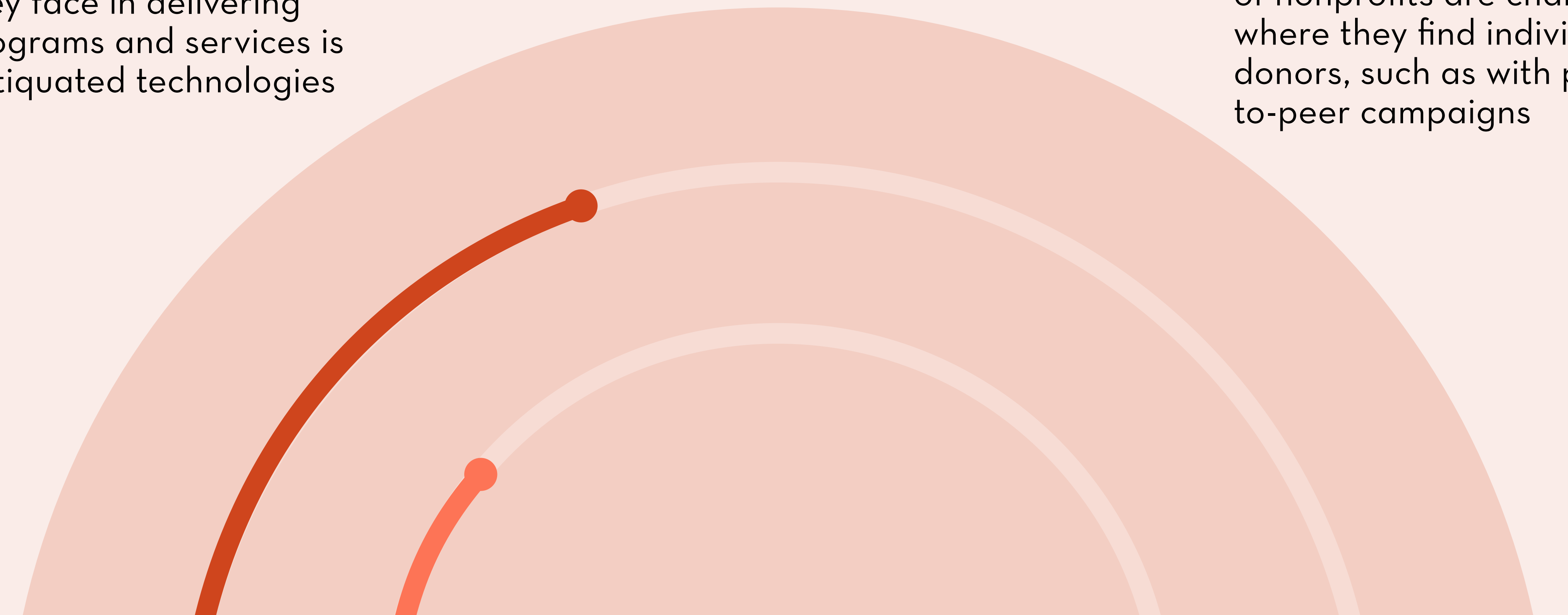
Adoption Technology & Using it Comprehensively

19%

say one of the obstacles they face in delivering programs and services is antiquated technologies

37%

of nonprofits are changing where they find individual donors, such as with peer-to-peer campaigns



Comparison of Current Usage vs. Planned Usage of Technology

Technology	Currently Use	Plan to with the next year	Plan to within the next 2 years
CRM	87%	6%	5%
Marketing automation	34%	32%	24%
Social engagement	34%	27%	28%
Community platform	29%	38%	20%
Mobile apps for constituents	31%	32%	30%

Germany
103 Nonprofit Professionals

Creating Meaningful Constituent Experiences

47% measure donor satisfaction

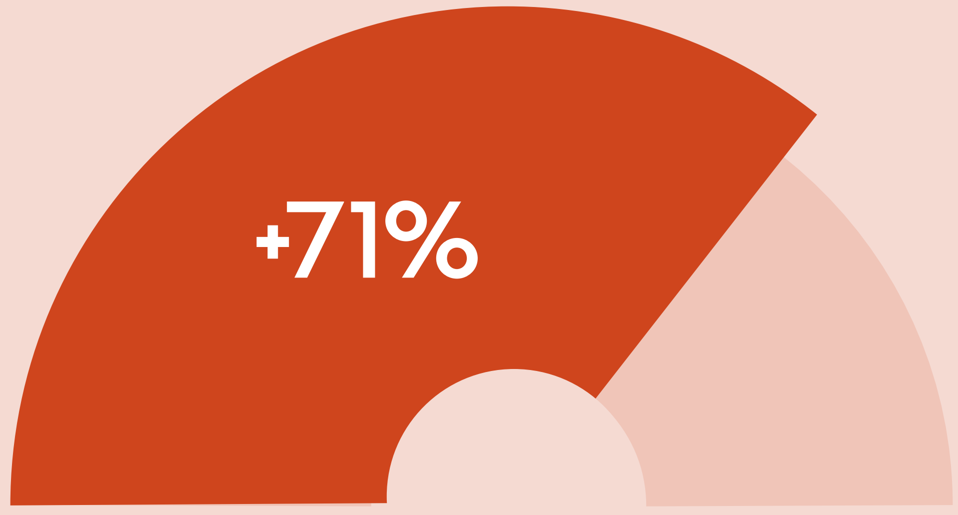
47% measure client/program participants

23%

stated that changes in government funding have affected their ability to deliver on their mission

+78%

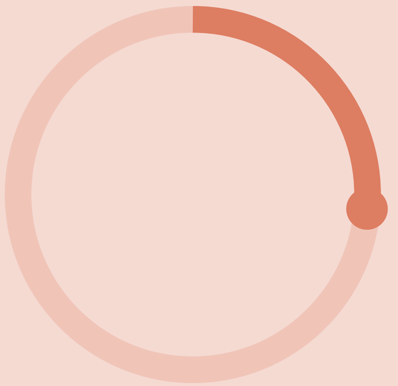
say constituents' desire to participate in their organizations has increased over the past 5 years



have stated there has been an increase in demand for transparency over the past 5 years

26%

state that there is a lack of trust and transparency



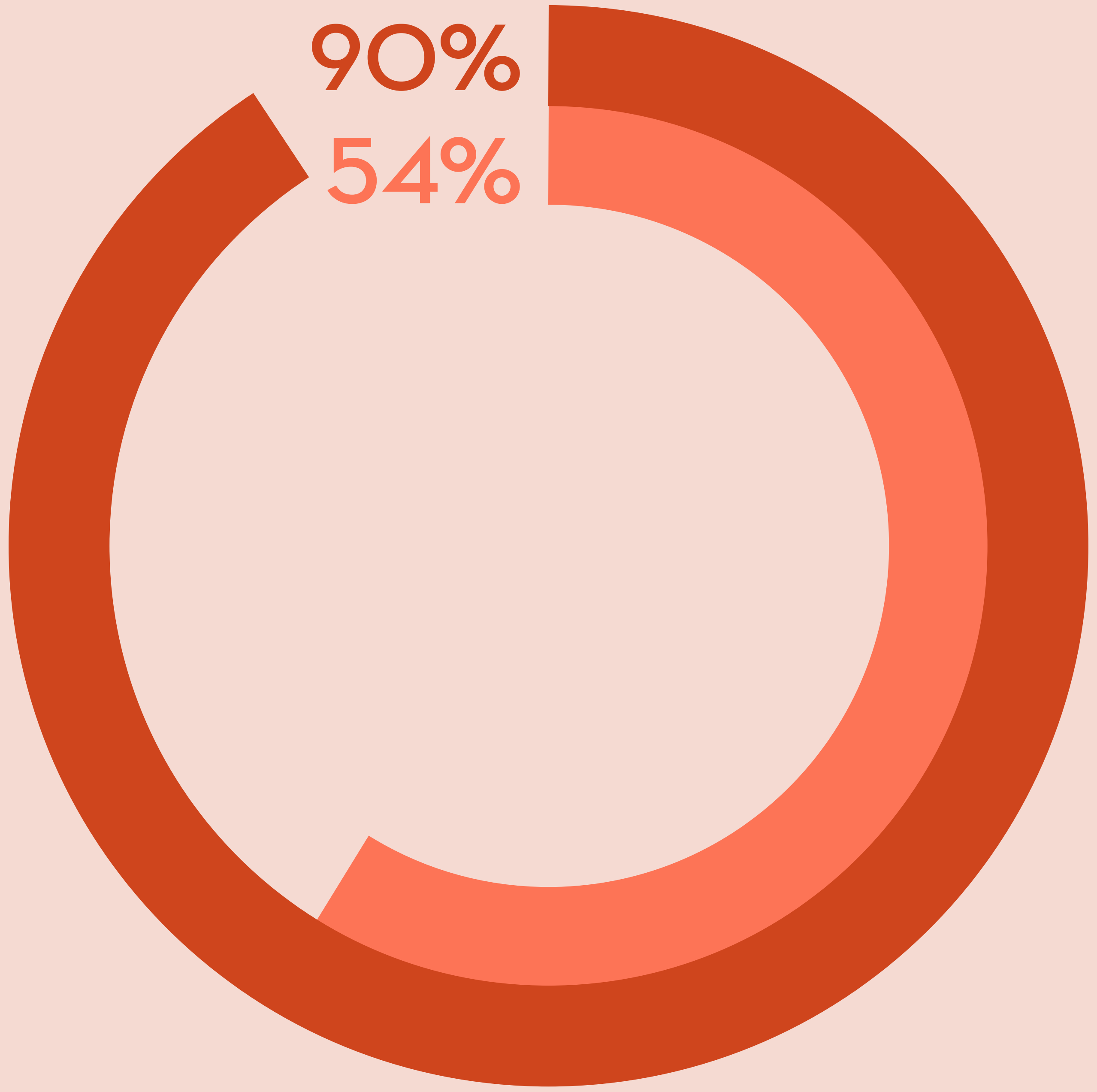
Data & Measurement Across Departments

38% measure overall mission goals

39% measure marketing goals

23% measure donor acquisition

19% measure donor coversion



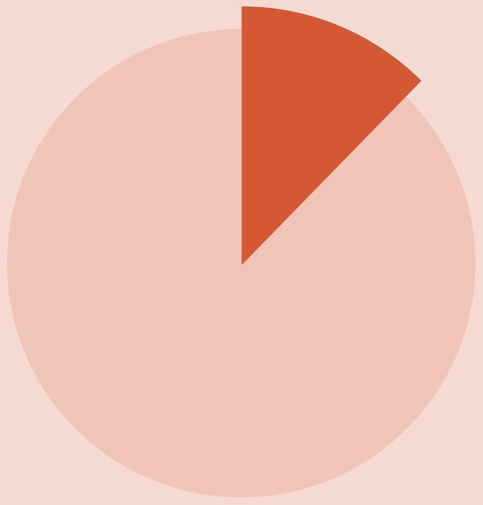
54% say that capturing and managing accurate data on constituents is at least a substantial challenge

90% state it is hard to understand if their programs are effective and/or reaching the population they set out to serve

Germany
103 Nonprofit Professionals

Alignment, Access & Change for Technology

Challenges nonprofits face to adopt new technologies



13%
say that have a long-term vision for all their technology

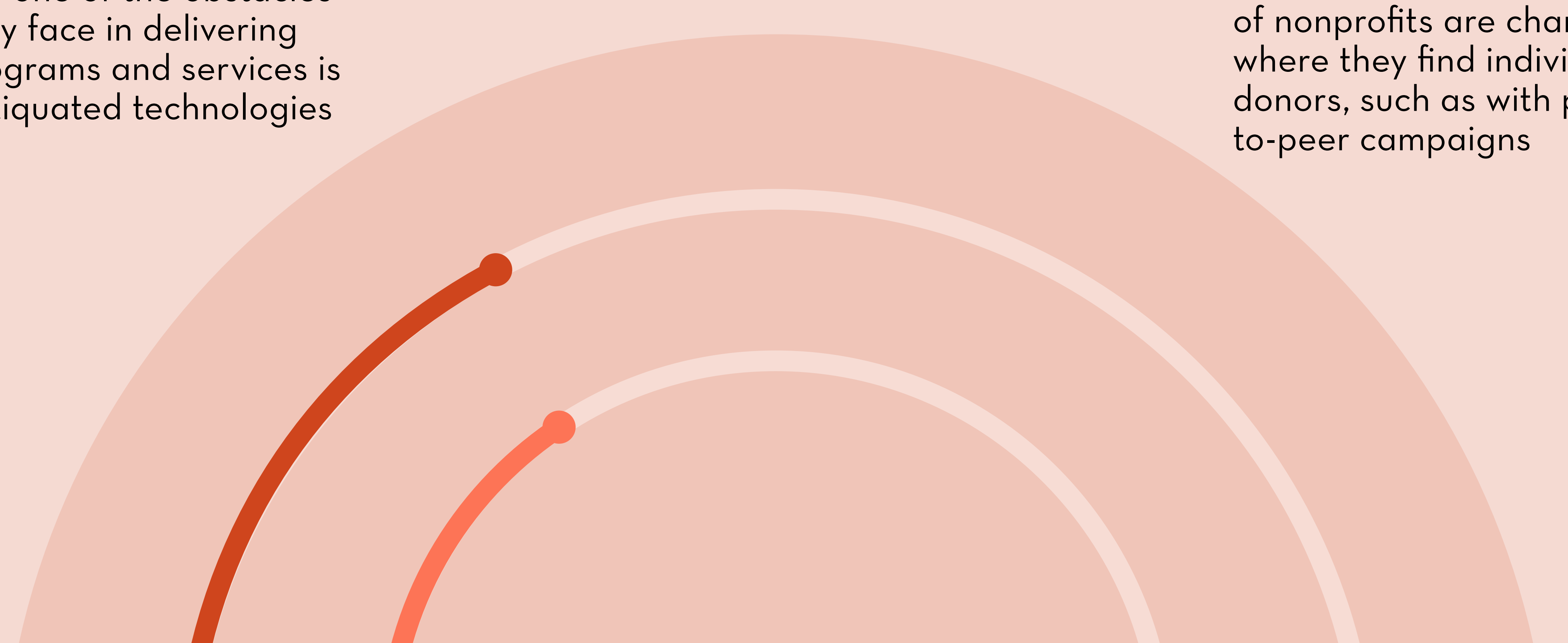
50%
state that not being able to prove return on investment is at least a major challenge

33%
state their fundraising and marketing teams are fully aligned on strategy and data

Adoption Technology & Using it Comprehensively

32%
say one of the obstacles they face in delivering programs and services is antiquated technologies

36%
of nonprofits are changing where they find individual donors, such as with peer-to-peer campaigns



Comparison of Current Usage vs. Planned Usage of Technology

Technology	Currently Use	Plan to with the next year	Plan to within the next 2 years
CRM	82%	5%	7%
Marketing automation	27%	37%	27%
Social engagement	31%	35%	26%
Community platform	28%	36%	26%
Mobile apps for constituents	25%	46%	18%

Appendix

Organization Sizes, Causes, & Department Details

United States

Role Within Organization	Base	Percent
Owner or equivalent	12	6%
Board of Directors, Chairman, or equity owner	1	0.5%
President or CEO	22	11%
Other executive mgmt (CMO, CTO, CIO, CFO, etc.)	21	11%
Vice president or equivalent	14	7%
Director or equivalent	49	25%
Manager or equivalent	65	33%
Analyst or equivalent	5	3%
Generalist, staff, associate, or equivalent	10	5%
Coordinator, administrator, or equivalent	1	0.5%

Primary Cause Supported	Base	Percent
Arts, culture, and humanities	13	7%
Education and youth development	22	11%
Environment and animals	13	7%
Religion related	10	5%
Foundations	7	4%
Health	13	7%
Human services	60	30%
International development	2	1%
Humanitarian aid	8	4%
Public and societal benefit	46	23%
Other	6	3%

Department	Base	Percent
Programs	99	50%
Fundraising	91	46%
Grants management	97	49%
Technology	83	42%
HR/Office	89	45%
Marketing	84	42%
Other	26	13%

Employees

Local / Chapter Level	Base	Percent
1 to 25 employees	34	17%
26 to 59 employees	73	37%
60 to 250 employees	43	22%
More than 250 employees	15	8%
Does not apply (i.e., we don't have chapters)	35	18%

Entire Organization	Base	Percent
1 to 25 employees	39	20%
26 to 59 employees	12	6%
60 to 100 employees	17	9%
101 to 250 employees	29	15%
251 to 500 employees	53	27%
501 to 3,500 employees	45	23%
3,501 to 10,000 employees	3	2%
More than 10,000 employees	2	1%

Organization Sizes, Causes, & Department Details

United Kingdom

Role Within Organization	Base	Percent
Owner or equivalent	1	1%
Board of Directors, Chairman, or equity owner	8	8%
President or CEO	10	10%
Other executive mgmt (CMO, CTO, CIO, CFO, etc.)	16	16%
Vice president or equivalent	12	12%
Director or equivalent	21	21%
Manager or equivalent	31	30%
Analyst or equivalent	1	1%
Generalist, staff, associate, or equivalent	0	0%
Coordinator, administrator, or equivalent	2	2%

Primary Cause Supported	Base	Percent
Arts, culture, and humanities	10	10%
Education and youth development	10	10%
Environment and animals	7	7%
Religion related	8	8%
Foundations	3	3%
Health	8	8%
Human services	18	18%
International development	9	9%
Humanitarian aid	8	8%
Public and societal benefit	18	18%
Other	3	3%

Department	Base	Percent
Programs	36	35%
Fundraising	29	28%
Grants management	33	32%
Technology	42	41%
HR/Office	34	33%
Marketing	27	27%
Other	11	11%

Employees

Local / Chapter Level	Base	Percent
1 to 25 employees	33	32%
26 to 59 employees	25	25%
60 to 250 employees	31	30%
More than 250 employees	8	8%
Does not apply (i.e., we don't have chapters)	5	5%

Entire Organization	Base	Percent
1 to 25 employees	6	6%
26 to 59 employees	14	14%
60 to 100 employees	13	13%
101 to 250 employees	27	27%
251 to 500 employees	15	15%
501 to 3,500 employees	20	20%
3,501 to 10,000 employees	4	4%
More than 10,000 employees	3	3%

Organization Sizes, Causes, & Department Details

Canada

Role Within Organization	Base	Percent
Owner or equivalent	3	3%
Board of Directors, Chairman, or equity owner	14	13%
President or CEO	23	22%
Other executive mgmt (CMO, CTO, CIO, CFO, etc.)	15	14%
Vice president or equivalent	7	7%
Director or equivalent	13	12%
Manager or equivalent	21	20%
Analyst or equivalent	2	2%
Generalist, staff, associate, or equivalent	6	6%
Coordinator, administrator, or equivalent	1	1%

Primary Cause Supported	Base	Percent
Arts, culture, and humanities	11	11%
Education and youth development	14	13%
Environment and animals	12	11%
Religion related	10	10%
Foundations	3	3%
Health	8	8%
Human services	16	15%
International development	5	5%
Humanitarian aid	6	6%
Public and societal benefit	18	17%
Other	2	2%

Department	Base	Percent
Programs	28	27%
Fundraising	33	31%
Grants management	24	23%
Technology	35	33%
HR/Office	36	34%
Marketing	28	27%
Other	11	11%

Employees

Local / Chapter Level	Base	Percent
1 to 25 employees	21	20%
26 to 59 employees	48	46%
60 to 250 employees	20	19%
More than 250 employees	9	9%
Does not apply (i.e., we don't have chapters)	7	7%

Entire Organization	Base	Percent
1 to 25 employees	11	11%
26 to 59 employees	7	7%
60 to 100 employees	13	12%
101 to 250 employees	33	31%
251 to 500 employees	18	17%
501 to 3,500 employees	17	16%
3,501 to 10,000 employees	4	4%
More than 10,000 employees	2	2%

Organization Sizes, Causes, & Department Details

Netherlands

Role Within Organization	Base	Percent
Owner or equivalent	4	4%
Board of Directors, Chairman, or equity owner	9	8%
President or CEO	10	9%
Other executive mgmt (CMO, CTO, CIO, CFO, etc.)	9	8%
Vice president or equivalent	17	16%
Director or equivalent	33	31%
Manager or equivalent	18	17%
Analyst or equivalent	4	4%
Generalist, staff, associate, or equivalent	2	2%
Coordinator, administrator, or equivalent	2	2%

Primary Cause Supported	Base	Percent
Arts, culture, and humanities	6	6%
Education and youth development	13	12%
Environment and animals	8	7%
Religion related	4	4%
Foundations	4	4%
Health	11	10%
Human services	26	24%
International development	10	9%
Humanitarian aid	3	3%
Public and societal benefit	22	20%
Other	1	1%

Department	Base	Percent
Programs	46	43%
Fundraising	21	19%
Grants management	25	23%
Technology	58	54%
HR/Office	24	22%
Marketing	34	32%
Other	4	4%

Employees

Local / Chapter Level	Base	Percent
1 to 25 employees	32	30%
26 to 59 employees	30	28%
60 to 250 employees	29	27%
More than 250 employees	15	14%
Does not apply (i.e., we don't have chapters)	2	2%

Entire Organization	Base	Percent
1 to 25 employees	2	2%
26 to 59 employees	14	13%
60 to 100 employees	17	16%
101 to 250 employees	12	11%
251 to 500 employees	30	29%
501 to 3,500 employees	22	20%
3,501 to 10,000 employees	6	6%
More than 10,000 employees	5	5%

Organization Sizes, Causes, & Department Details

Germany

Role Within Organization	Base	Percent
Owner or equivalent	0	0%
Board of Directors, Chairman, or equity owner	8	8%
President or CEO	23	22%
Other executive mgmt (CMO, CTO, CIO, CFO, etc.)	8	8%
Vice president or equivalent	7	7%
Director or equivalent	17	17%
Manager or equivalent	35	34%
Analyst or equivalent	4	4%
Generalist, staff, associate, or equivalent	1	1%
Coordinator, administrator, or equivalent	0	0%

Primary Cause Supported	Base	Percent
Arts, culture, and humanities	13	13%
Education and youth development	15	15%
Environment and animals	9	9%
Religion related	3	3%
Foundations	6	6%
Health	4	4%
Human services	14	14%
International development	6	6%
Humanitarian aid	7	7%
Public and societal benefit	24	23%
Other	1	2%

Department	Base	Percent
Programs	29	28%
Fundraising	13	13%
Grants management	24	23%
Technology	58	56%
HR/Office	25	24%
Marketing	20	19%
Other	5	5%

Employees

Local / Chapter Level	Base	Percent
1 to 25 employees	30	29%
26 to 59 employees	39	38%
60 to 250 employees	25	24%
More than 250 employees	7	7%
Does not apply (i.e., we don't have chapters)	2	2%

Entire Organization	Base	Percent
1 to 25 employees	1	1%
26 to 59 employees	4	4%
60 to 100 employees	15	15%
101 to 250 employees	47	46%
251 to 500 employees	19	18%
501 to 3,500 employees	9	9%
3,501 to 10,000 employees	3	3%
More than 10,000 employees	5	5%

Organization Sizes, Causes, & Department Details

France

Role Within Organization	Base	Percent
Owner or equivalent	3	3%
Board of Directors, Chairman, or equity owner	10	9%
President or CEO	21	20%
Other executive mgmt (CMO, CTO, CIO, CFO, etc.)	12	11%
Vice president or equivalent	6	6%
Director or equivalent	9	8%
Manager or equivalent	26	24%
Analyst or equivalent	4	4%
Generalist, staff, associate, or equivalent	9	8%
Coordinator, administrator, or equivalent	7	7%

Primary Cause Supported	Base	Percent
Arts, culture, and humanities	14	13%
Education and youth development	13	12%
Environment and animals	8	8%
Religion related	3	3%
Foundations	6	6%
Health	10	9%
Human services	26	24%
International development	7	7%
Humanitarian aid	7	7%
Public and societal benefit	13	12%
Other	0	0%

Department	Base	Percent
Programs	26	24%
Fundraising	40	37%
Grants management	38	36%
Technology	37	35%
HR/Office	34	32%
Marketing	24	22%
Other	8	8%

Employees

Local / Chapter Level	Base	Percent
1 to 25 employees	179	25%
26 to 59 employees	252	35%
60 to 250 employees	179	25%
More than 250 employees	63	9%
Does not apply (i.e., we don't have chapters)	52	7%

Entire Organization	Base	Percent
1 to 25 employees	4	4%
26 to 59 employees	12	11%
60 to 100 employees	20	19%
101 to 250 employees	34	32%
251 to 500 employees	16	15%
501 to 3,500 employees	13	12%
3,501 to 10,000 employees	6	6%
More than 10,000 employees	2	2%

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